



COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDs)

**ERIE COUNTY
NEW YORK**

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EXECUTIVE SUMMARY

INTRODUCTION

Since the late 1970's, the Erie County Industrial Development Agency (ECIDA) has been the area's designated liaison to the U.S. Department of Commerce, Economic Development Administration (EDA). As such, ECIDA has served as the applicant for millions of dollars in grant funds which, among other things, were used to set up a County-wide revolving loan fund and for numerous public works and planning projects including the construction of industrial incubators, a training center, and infrastructure for several industrial sites. In order to maintain the area's eligibility for EDA funding over the years, the ECIDA produced and annually updated an Overall Economic Development Plan (OEDP) for the entire County. After 1998 EDA replaced the OEDP requirement with a similar, but slightly different, requirement for eligibility, namely the preparation of a Comprehensive Economic Development Strategy (CEDS). Unlike the OEDP, the CEDS did not need to be produced or updated on an annual basis. However, since a CEDS remains a requirement for funding from EDA, over a ten month period beginning in April 2009, ECIDA has prepared this Comprehensive Economic Development Strategy (CEDS) for Erie County.

Not only is a CEDS a pre-condition for accessing EDA's standard funding programs, it is also necessary to keep the Buffalo and Erie County Regional Development Corporation's (RDC's) federally funded revolving loan fund (RLF) (which is administered by ECIDA) in compliance with EDA regulations. EDA now requires that Loan Administration Plans (LAP) for revolving loan funds be updated no less often than every 5 years. Since the RLF - LAP is designed to address issues identified in a CEDS document, consistency between these documents is necessary.

ECIDA has taken the position that the Comprehensive Economic Development Strategy for Erie County, New York should not and need not be a stand-alone document, nor should it be considered a **new** strategy for guiding economic development efforts within Erie County. Rather, this CEDS for Erie County is an **extraction and combining of the primary findings and strategic directives of several recent planning studies and reports undertaken by County and City government, economic development organizations and area institutions. Considerable time and money has been spent on these studies and reports and, taken together, they provide a comprehensive and current set of guidelines for action.** Some of the documents used as **building blocks** for this CEDS were focused on the geographical and physical development of the community rather than on economic development initiatives alone; nevertheless such plans impact economic development in significant ways. Others of the "building blocks" were more specific to economic development (e.g., target industry studies) but not intended to provide a comprehensive strategy. **Therefore, we have built this CEDS on elements from several existing strategies which were most appropriate for inclusion in a Comprehensive Economic Development Strategy for Erie County.** Some of the

studies and reports used to “build” the CEDS were the following (which are described in extensive detail in Chapter 3 – “Planning for our Future”):

- **The Framework for Regional Growth**
- **Erie County’s Road to a Bright Future**
- **Queen City in the 21st Century – Buffalo’s Comprehensive Plan**
- **Queen City Hub: Regional Action Plan for Downtown**
- **Buffalo Niagara Medical Campus Mater Plan**
- **Erie Canal Harbor Master Plan**
- **South Buffalo Brownfield Opportunity Area – Master Plan**
- **Greater Buffalo Niagara Region Transportation Council – 2030 Long Range Transportation Plan**
- **UB 2020 – Comprehensive Physical Plan for the State University of Buffalo**
- **Workforce Investment Board – Comprehensive Three-Year Local Plan**

CEDS SECTIONS

1. Starting Point

As a background for our strategy, in Chapter 1 of the CEDS we provide a socioeconomic profile of Erie County based on population characteristics, geography, information about our location and access to/from the area, quality of life characteristics (including housing and the cost of living, health care, recreational attractions, and cultural amenities) and the area’s economy. With respect to the latter, we describe the long-term structural changes in the local economy over the last few decades, during which we transitioned from a manufacturing base to a service and trade based economy. Among other trends, we document that

During the 1970’s there were significant employment losses in both durable and non-durable goods manufacturing; Between 1971 and 1981 the area lost over 18,000 manufacturing jobs 70% of which were in primary metals production. During the first half of the 1980’s, structural shifts in the area’s economy resulted in both high unemployment and outmigration (adding further to a decline in population resulting from lower birth rates). An increase in service sector and trade sector jobs in Erie County during the 1980’s partially offset the loss of manufacturing jobs. Net overall job growth in the latter part of the 1980’s (15.4% between 1982 and 1989) was dampened by the recession of 1990 - 1992 which saw unemployment rates once again on the rise. There were 18,400 jobs lost in Erie County during that two year period. Nonetheless, during that recession the impact on Western New York was not as severe as in other parts of the State and employment declines here were only 40% of those of the State as a whole. Erie County’s economy experienced some recovery in the latter part of the 1990’s, and, overall, employment declines had been generally moderate between 2000 and 2008. During this latter period, average annual unemployment rates in

the County ranged from a high of 7.8% in 2000 to a low of 4.6% in 2007.

Needless to say, global downturns in the economy beginning in 2008, have had significant impacts on the local economy of the County and region. Due to increased diversity in our economy since the 1990's, we have been to some degree more "recession proof" than the State of New York or the U.S. as a whole, nevertheless, we continue to experience notable contractions in the manufacturing sector and private sector jobs. As noted by the NYS Department of Labor's regional analyst in March 2010:

We're seeing the effects of a year-and-a-half of recession. This may have started out in the financial industry and the construction industry, but for Western New York, it's turned into a classic manufacturing recession.....the recession's impact on local factory jobs has been much more severe than initially thought, with total employment (in the two county Erie-Niagara region) at manufacturers plummeting by 11 percent over the last year to an all time low of about 47,500 people....nearly one in 11 factory jobs in the region has disappeared over the last year, with declines at the local auto plants accounting for a significant portion of the drop¹

On the brighter side, as noted in Chapter 1, are some positive economic initiatives in recent years related to (1) cross-border trade with Canada, (2) growth in life sciences and bioinformatics research and the related development of a world-class medical campus in the City of Buffalo, (3) growth in the financial sector and (4) waterfront development activities.

2. The Infrastructure of Economic Development

Chapter 2 is an analysis of our assets and challenges in terms of the three primary components of economic development infrastructure – **labor, land and capital**. With respect to labor, we document the availability of a well-educated, highly productive workforce and competitive labor costs (despite an historically high rate of unionization) but note that there remain challenges in maintaining a workforce that meets the requirements of emerging markets in terms of skills, age and cost. The County continues to grapple with normal rates of outflow of educated, younger people, coupled with very low immigration rates, and with the problems stemming from an aging, unemployed and underemployed remaining workforce lacking suitable technological skills creating a gap between supply and demand.

In terms of land resources, we are both blessed and cursed with a surplus of infrastructure and properties particularly within the more urbanized areas of the County. While we have a large inventory of industrial and commercial sites throughout the County, much of the vacant land is either not served by public utilities or in need of expensive environmental remediation. Where we have extensive, underutilized utilities (i.e., the urbanized areas) is also where we are most likely to

¹ The Buffalo News, March 5, 2010, quoting John Slenker, NYS Labor Department regional economist.

find the highest share of abandoned or underutilized brownfield and “greyfield” properties. Similarly, though we have a significant inventory of available office and industrial space, a good deal of this space is obsolete or difficult and expensive to retrofit to meet the needs of today’s industrial and commercial markets. This creates a seeming contradiction – relatively high inventories of industrial and commercial land and buildings at the same time as we have a need for more modern facilities and shovel-ready sites.

Though collectively there are a number of capital resources and financial assistance programs for businesses in Erie County as provided by ECIDA, the City of Buffalo, and the 5 suburban IDA’s among others (which programs are described in detail in Chapter 2), there are significant challenges to providing financial incentives to businesses in Erie County, a problem compounded by the fact that New York State is one of the most costly in which to do business and by the current difficulties in accessing conventional sources of capital. In particular, as noted in Chapter 2, we have a pressing and growing need for

- Additional capital and technical assistance for seed and second stage, technology-based companies
- Accelerated levels of conventional, private lending activity
- Additional public lending capacity
- Additional State and federal funding for brownfield and greyfield remediation efforts
- Additional incentives for adaptive reuse projects
- Tiered incentives targeted to growth sectors and to the more distressed parts of our community

3. Planning for Our Future

In Chapter 3, we provide detailed information on the several planning and strategic documents which form the backbone of this Comprehensive Economic Development Strategy for Erie County. Though not all of the documents referenced are focused on economic development per se, all have some degree of impact on our economic development initiatives. **The Framework for Regional Growth**, for example, provides a set of principles and guidelines for growth and investment which form the primary basis and reference point for several of the other strategic plans that have been incorporated into this CEDS. The **Framework** is a “blueprint to support the actions of County and regional agencies relating to the area’s physical development”. It recommends sustainable targets for future development based on “increased reinvestment in Developed Areas, controlled growth in Developing Areas, (and) substantially lower rates of land consumption in Rural Areas”² to the end of saving the region considerable resources that would otherwise be spent on continuing to expand and maintain infrastructure that is out of balance with anticipated population growth. **Erie County’s**

² **The Framework for Regional Growth**, Chapter 3

Road to a Bright Future is one of the primary foundation documents for this CEDS. It sets forth the County’s “vision and plan...focusing on the key areas of economic development”. **Road to a Bright Future** presents the following ten major agenda items to facilitate the County’s growth and prosperity:

- Make our community a global gateway
- Focus on entrepreneurship, innovation and small business
- Take advantage of our waterfront and greenway
- Promote our community’s arts, culture and heritage
- Make our community a tourist destination
- Promote our region’s agricultural industry
- Use our higher education institutions as a gateway
- Become the back office capital of America
- Advance high and low tech manufacturing
- Position our area as a medical powerhouse

The City of Buffalo’s Comprehensive Plan, **Queen City in the 21st Century**, is the “framework for all...planning initiatives in the City”. It has a single goal, “to transform Buffalo as the urban center of the Buffalo Niagara region through application of smart growth principles, targeted investments, and managed physical change to restore the economic well being, environmental health and sustainability of the city”.

Specifically with respect to the City’s economy, the Comprehensive Plan has as one of the key policies for guiding investment the goal of transitioning “to a modern mixed economy while working to maintain the base of manufacturing, rationalizing the delivery of economic development services, investing in transportation, redeveloping land for economic expansion, leveraging the special regional role of Downtown, and developing local and regional heritage to attract skilled workers, capital and tourists”.³

The City of Buffalo also has a specific plan for downtown Buffalo, **Queen City Hub: Regional Action Plan for Downtown**, which recognizes the regional economic importance of the downtown area and identifies the following key investment areas in downtown: the Erie Canal Harbor and Waterfront District; the Downtown Education and Public Safety Campus; the Financial District and Government Center; the Theatre District; and the Buffalo Niagara Medical Campus.

Two subareas of the City of Buffalo and County of Erie, which have and will have increasingly significant impact on the County’s economy are the Buffalo Niagara Medical Campus and the Erie Canal Harbor. The Master Plans for the medical campus and for redevelopment of the waterfront are described in detail in Chapter 3.

Implementation of these plans are seen as vital to the economic transformation of both the City of Buffalo and the County of Erie. As shown in Chapter 3 of the CEDS and in subsequent chapters, the medical campus and waterfront initiatives are closely linked to other major initiatives such as the UB 2020 Master Plan, the revitalization of inner city neighborhoods, and planning for brownfield opportunity areas.

³ Queen City in the 21st Century, Buffalo’s Comprehensive Plan, page 7

Chapter 3 includes a discussion of other planning documents that will guide investment and development of significance to the County's economic prosperity. These are the **Brownfield Opportunity Area** planning documents, the regional **2030 Long Range Transportation Plan** which will guide investment in the regional transportation system, and **UB 2020**, which is both a physical plan for the three campuses of the State University of New York at Buffalo **and** an institutional strategic plan for the University. UB has an estimated current annual economic impact of \$1.7 billion on the local economy which is projected to grow to \$3.6 billion over a 20 year period with implementation of the UB 2020 plan. In particular, the plan to expand UB's downtown campus to accommodate the medical, nursing and public health disciplines is likely to have a major economic impact on the City of Buffalo and the urban core.

The final section of Chapter 3 outlines the workforce strategies of the Workforce Investment Board and related organizations which partner to advance the skills of the County's labor force in coordination with economic development strategies and to link workforce supply and skills with the requirements of employers.

4. Targeting Our Economic Development Efforts

Several of the various planning documents that comprise this CEDS call for targeting our efforts toward those economic sectors that already have a strong base in our community or for which our region offers particular complementary assets. Over the past several years a number of studies have been carried out to identify and characterize these "target clusters and industry sectors". As a result, we currently have widespread agreement among the County's economic development entities that our primary target sectors are the following:

- Agriculture/Agribusiness
- Logistics/Distribution
- Back Office/Call Centers/Professional Services
- Advanced Manufacturing
- Life Sciences
- Regional/Cultural Tourism

Chapter 4 of the CEDS extensively documents the work that has been carried out to date by a number of economic development organizations within the County and region to define and analyze each of the target sectors and to capitalize on opportunities for growth and attraction in each sector.

5. Directions

All of the plans we incorporated into our CEDS, whether comprehensive or more strategically targeted, when taken together, offer us a common set of principles. And

these common themes are notably different from the area's economic development strategies of the 1970's – 1990's which favored, among other things, investment in expanding infrastructure outward (based on projections of a significant increase in population), incentives for development of campus-like commercial and industrial centers on greenfield sites, segregation of land uses (v. mixed use development), and initiatives to diversify the economy that were largely untargeted to specific industry sectors. Chapter 5 demonstrates how, in place of the strategies of past decades, we are **now** guided by the following inter-related set of principles:

- Principle #1: Sustainability and Smart-Growth
- Principle #2: Fix and Maintain Our Existing Infrastructure
- Principle #3: Build on Our Assets
- Principle #4: Coordinated Planning and Development

6. On Our Way

Chapter 6 indicates how the collective set of planning documents and the guiding principles that they share in common are, or will, be translated into action items and initiatives by the key economic development agents in Erie County. It is our premise that implementation of the Comprehensive Economic Development Strategy for Erie County will come through implementation of the **sum set** of strategic action items and project priorities identified in Chapter 6 and that the responsibility for implementation rests with not one but several organizations having the appropriate authority and expertise to carry out the CEDS. Chapter 6 sets forth the strategic priorities for Erie County, the Erie County Industrial Development Agency (in its 3-year Strategic Plan) and the City of Buffalo, among others, and details regarding specific project priorities and action items.

7. Public Participation in the Development of Strategic Plans

The CEDS for Erie County is a compendium of previously adopted strategic plans. Chapter 7 documents the extent to which all of the major planning documents that form the basis of, and are included in, the CEDS have had extensive public airing, public input and participation from stakeholders and the general public during preparation.

Chapter 1

Starting Point

STARTING POINT ERIE COUNTY, NEW YORK

The metropolitan Buffalo Niagara area includes the two Western New York counties of Erie and Niagara. Erie County covers 1,058 square miles and is bounded by Lake Erie, the Niagara River and Ontario, Canada to the west, Niagara County to the north, Genesee and Wyoming Counties to the east and Cattaraugus and Chautauqua Counties to the south. Located within Erie County are three cities and twenty-five towns, including the City of Buffalo, the second largest city in the State, which serves as the County seat. More than half the population of the U.S. and Canada (160 million people), 75% of Canada's manufacturing activity, 55% of U.S. manufacturing activity, as well as 52% of personal income in the two countries, are within a 500 mile radius of Erie County.

The City of Buffalo

The County's largest city, Buffalo, is the second largest city in the State of New York and the hub of the region. According to Buffalo's comprehensive plan, the City today "faces great challenges: the long-term decline in population and jobs, deterioration in housing and neighborhoods, public schools under stress, great environmental damage to repair and huge investments to make." Nevertheless, the City and region, as noted below, possess a variety of both natural and man-made assets including an expansive waterfront location on Lake Erie, a wealth of arts, culture, historic sites, entertainment, advanced technology, research and educational institutions.

AREA DATA

Population Characteristics

Between 1970 and 1980, Erie County's population fell by almost 100,000; population decline between 1980 and 1990 (46,940), however, was only about half as great as during the previous decade. Population again declined between 1990 and 2000 but by only a very modest amount, and further declines are estimated for 2006, 2007 and 2008 for Erie County. By contrast, during the period between 2000 and 2008 New York State had a modest overall population increase of 2.5% with most of the growth in downstate counties. The County's population (as that of the region) has also aged over the past thirty years, a trend that appears to be continuing.

TABLE I
POPULATION - ERIE COUNTY

Year	1970	1980	1990	2000	2006 (est.)	2007(est.)	2008 (est.)
Total	1,113,491	1,015,472	968,532	950,265	918,339	912,158	909,845
Minority	106,648	122,277	146,366	169,323	N/A	N/A	
Percent Minority	9.6%	12%	15.1%	17.8%			

Source: U.S. Census of Population

*Estimated loss between July 2007 and July 2008 = 8,494

TABLE 2
PERCENT BY AGE GROUP – ERIE COUNTY
1990 and 2000 CENSUS AND 2008 ESTIMATES

	1990	2000	2008 (est.)
Under Age 18	23.28%	24.30%	24.60% ¹
18 – 24 years	10.71%	8.70%	7.66%
25 to 44 years	30.83%	28.40%	24.47%
45 to 64 years	20.00%	22.70%	27.60%
65 years or older	15.19%	15.90%	15.57%

Median Age: 38 years in 2000, 40 years in 2008 (est.)

Source: U.S. Census of Population

Although the County’s loss of population between 1990 and 2000 was more modest than during the prior decade, the City of Buffalo’s population loss between 1990 and 2000 was severe; 35,475 fewer people (a nearly 11% drop in population) occurred during that decade. The City continued to lose population between 2000 and 2007 (a 6.8% decrease) during which time period population loss was also experienced by suburban communities in the County by varying degrees. Of the larger towns, only the Towns of Lancaster and Orchard Park experienced growth during this seven year period.

TABLE 3
POPULATION CHANGE FOR VARIOUS MUNICIPALITIES
2000 TO 2007

Municipality	2000	2007 (est.)	% Change
City of Buffalo	292,648	272,632	- 6.8%
Town of Amherst	116,510	115,581	- .07%
Town of Tonawanda	78,155	72,259	- 7.5%
Town of Cheektowaga	94,019	88,389	- 5.9%
Town of Lancaster	39,019	40,246	+ 3.1%
Town of Orchard Park	27,637	28,490	+3.0%

Source: U.S. Census of Population

As of the 2000 Census there were 380,873 households, 415,868 housing units and 243,377 families in Erie County. 2005 – 2007 estimates indicate a small decrease (to 378,698) in the number of households but a slight increase (to 422,472) in the number of housing units. The average household size was 2.41 and the average family size 3.04; decreases in both are estimated for the period since the 2000 census. Median income for a household in the County is

¹ 2008 populaton estimates are for age groups 20 to 24 and under age 20

\$44,650 and median income for a family is \$60,453 (in 2007 inflation adjusted dollars) (lower than the statewide average).² Estimated median earnings for males in Erie County are 36% higher than for females (in 2007) at \$46,348 for males v. \$34,238 for females. Estimates for 2007 indicate an Erie County per capita income of \$25,995 (in 2007 inflation-adjusted dollars) compared to a NYS per capita income of \$29,885. Erie County ranks 14th highest out of 62 NYS counties in per capita income (the majority of counties with higher per capita income are located downstate).³ About 9.20% of Erie County families and 12.20% of the County population were below the poverty line in 2000. The number of persons living below the poverty level in Erie County had increased to 13.9% as of the 2007 Census estimates.⁴

GEOGRAPHY AND RESOURCES

Location and Access

Erie County is approximately 100-miles from Toronto and 300-miles from New York City. The region's six international bridges handle approximately 40% of the \$188 billion of trade between Canada and the United States. The County has the benefit of an extensive, established network of land, air, rail and water linkages.

Air:

The County has convenient access to two international airports. The Greater Buffalo International Airport (GBIA) serves not only the Buffalo area, but also Southwest Ontario, Canada. It is the busiest airport in Upstate New York, and the third busiest in New York State by number of boardings. The present terminal was designed by Kohn Pedersen Fox and was constructed between 1995 and 1997 and expanded to 26 gates in 1999. In 2006, the main runway was repaved and extended 750 feet, its first major upgrade since 1980. The secondary runway was extended 1,000 feet as well. Southwest Airlines recently surpassed US Airways to become the largest carrier at GBIA in terms of number of passengers. US Airways was bumped to second and JetBlue Airways ranked third. Buffalo Niagara International Airport exceeded the 5,000,000 passenger mark for 2006 several years earlier than was predicted. The GBIA benefits from proximity to 8.1 million people across the border in Ontario, Canada. Approximately 25% of all passengers using GBIA are from Canada.

Airlines and destinations served from GBIA:

- AirTran Airways (Atlanta, Orlando)
- American Airlines
- American Eagle (Chicago-O'Hare, Dallas/Fort Worth)
- Continental Airlines (Newark)

² 2008 Median Household Income, adjusted for inflation, is estimated at \$47,739 for Erie County, compared to an adjusted NYS Median Household Income of \$53,713 and a U.S. Median Household Income of \$50,991. Source: www.muninetguide.com.

³ Source: Bureau of Economic Analysis

⁴ 2005-2007 estimates are from the American Community Survey, 3 - year estimates, U.S. Census Bureau

- Continental Connection operated by Colgan Air (Newark)
- Continental Connection operated by CommutAir (Cleveland)
- Continental Express operated by Chautauqua Airlines (Cleveland)
- Continental Express operated by ExpressJet Airlines (Cleveland, Newark)
- Delta Air Lines (Atlanta)
 - Delta Connection operated by Atlantic Southeast Airlines (Atlanta)
 - Delta Connection operated by Chautauqua Airlines (Cincinnati/Northern Kentucky)
 - Delta Connection operated by Comair (Atlanta, Cincinnati/Northern Kentucky, New York-JFK)
 - Delta Connection operated by Freedom Airlines (New York-JFK)
 - Delta Connection operated by Pinnacle Airlines (Atlanta)
- JetBlue Airways (Boston, Fort Lauderdale, Fort Myers, New York-JFK, Orlando)
- Northwest Airlines (Detroit, Minneapolis/St. Paul)
- Southwest Airlines (Baltimore/Washington, Chicago-Midway, Fort Lauderdale, Las Vegas, Orlando, Phoenix, Tampa)
- United Airlines (Chicago-O'Hare)
- United Express operated by Chautauqua Airlines (Washington-Dulles)
- US Airways (Charlotte, Philadelphia, Washington-Reagan)
 - US Airways Express operated by Air Wisconsin (Boston, New York-LaGuardia, Washington-Reagan)
 - US Airways Express operated by Colgan Air (Albany (NY), Rochester (NY))
 - US Airways Express operated by Piedmont Airlines (New York-LaGuardia, Philadelphia)
 - US Airways Express operated by Republic Airlines (Boston, Philadelphia, Washington-Reagan)

The region is also served by the Niagara Falls International Airport located in Niagara County, which, like GBIA, is owned and operated by the Niagara Frontier Transportation Authority (NFTA). Its runway is one of the longest in New York State and, for the most part, is used by a military base, cargo planes, and a very small number of charter flights. Early in 2007, Myrtle Beach Direct Air started service with direct flights to Myrtle Beach two days a week. A new terminal has recently opened and the airport hopes to lure some additional smaller airlines; there are also proposals to make the NFIA into an international cargo hub for the region and nearby Canadian markets.

Surface:

Within Erie County interstate highways I-90 (the New York State Thruway), I-190, and I-290, provide direct connections to eastern New York, five states and Canada. Access to Ontario from Erie County is over the Peace Bridge between Buffalo and Fort Erie, Ontario and onto the Queen Elizabeth Way. Seventeen State highways also intersect in the County. Mobility within the region is excellent. Traffic congestion is rare and most local destinations are within a twenty minute drive. According to a recent Federal study, the average work-commute time for

area residents is the lowest in 50 major US cities.

Rail:

In the City of Buffalo there is a 6.5 mile light rail rapid transit system, known as Metro Rail, which connects the University of Buffalo with the Central Business District (CBD) and the waterfront district to the South. There is no charge for service along the 1.2 mile stretch of Metro Rail within the CBD and free "park and ride lots" are offered near Metro Rail stops outside the CBD. Metro Rail is operated by the Niagara Frontier Transportation Authority (NFTA), which also operates 16 express and 19 local bus routes serving the City of Buffalo, Erie and Niagara Counties.

The Greater Buffalo region has one of the most highly developed rail systems in the world. Amtrak offers convenient passenger service to Toronto, Chicago, Syracuse, Rochester, Albany and New York City. Freight service is available from CSX Transportation and Norfolk Southern (NS), as well as Canadian National (CN) and Canadian Pacific (CP) railroads from across the border. The area has four large rail yard: Frontier (CSX), Bison (NS), SK (NS/CP) and Buffalo Creek (NS/CSX)

Waterways:

The Port of Buffalo, located on the former Bethlehem ship canal in Lackawanna, is one of the few industrial and business centers in the Northeast that offers an international deepwater port. Conveniently situated on Lake Erie with access to intermodal transportation, the port provides efficient transportation to markets in south-eastern Ontario and the northeastern United States. An extensive breakwall system protects the inner and outer Lake Erie harbors which are maintained at commercial navigation depths for Great Lakes freighters. World markets are served through the St. Lawrence Seaway. In addition to the Port of Buffalo, there are private maritime facilities along the County's Lake Erie and Niagara River shoreline, including the former Roblin Steel Site in the Town of Tonawanda, that could be used in support of commercial shipping.

The County's location at the eastern end of Lake Erie, one of the Great Lakes, also offers residents and visitors numerous recreational boating opportunities including access to excellent sand beaches on the nearby Ontario, Canada shore. Buffalo and Erie County are also the western terminus of the Erie Canal which ends where the Black Rock Channel enters Lake Erie. Once a major route for passengers and cargo, the Erie Canal is now used primarily by pleasure craft and for some light local freight. The Buffalo River, a tributary of Lake Erie is still in use to deliver, among other things, grain to local mills.

QUALITY OF LIFE

Housing and Cost of Living

The County and the Buffalo-Niagara metropolitan area rank high (5th out of 36) on the index of areas with the most affordable housing in the U.S. today. According to the NAHB/Wells Fargo Housing Opportunity Index, 90.4% of new and existing homes sold in the metropolitan area during the first quarter of 2009 were affordable to families having the area's median income.⁵ The Cost of Living index for the Buffalo-Niagara metropolitan area is at 95.8% of the U.S. national average which gives it a rank of 14th out of 38 metropolitan areas in terms of cost of living.⁶

Health Care

Residents of the region are offered an outstanding array of quality health services. The School of Medicine and Biomedical Sciences at the State University of New York at Buffalo was ranked by US News and World Report as seventh among comprehensive medical schools in the U.S. and it is an integral component of the quality health care system in the area. Among Greater Buffalo's 30 hospitals and medical institutions, three offer nationally recognized specialized services: Buffalo General Hospital (heart transplant), Women's and Children's Hospital (pediatric heart surgery), and Roswell Park Cancer Institute (comprehensive cancer care). Moreover, this high level of health care is very affordable. Studies of comparative metropolitan areas show the cost of hospital care in the Buffalo/Niagara metro region to be among the lowest in the United States.

Recreational Attractions

The region's best known attraction is, of course, the spectacular Niagara Falls, visited by over 12 million tourists each year. The Falls are only a twenty minute drive from the City of Buffalo and the Falls area is surrounded by associated art, historical, geological and natural science museums and sites. Many visitors also stop by the well known Prime Outlet Mall and Walden Galleria Mall. Opportunities for active sports are plentiful. Western New York and southern Ontario offer over 20 ski resorts, 100 golf courses and, with its location on Lake Erie and near large forest preserves and State Parks, excellent hiking, cross country skiing, fishing, hunting and boating.

The region is home to four professional sports teams: the Buffalo Bills (football), the Buffalo Sabres (hockey), the Buffalo Bisons (AAA minor league baseball), the Buffalo Bandits (lacrosse). The four-time AFC Champion Buffalo Bills, play at Ralph Wilson Stadium, located in Orchard Park. The HSBC Arena, a 20,000 seat, \$115 million dollar facility in the City of Buffalo, is the home of the Sabres and the Bandits. It is also a major concert venue. Coca-Cola Field, also located in the City of Buffalo, is the home of the Triple-A Buffalo Bisons of the International League. The classic-style stadium was completed prior to the team's 1988 season and remains one of the largest parks in all of Minor League Baseball. It has a seating capacity of over 18,000.

⁵ Source: National Association of Home Builders

⁶ Source: Council for Community & Economic Research; Cost of Living Index

Erie County has America's oldest coordinated system of public parks and parkways, designed by the renowned landscape architect Frederick Law Olmsted (1822-1903), in concert with his partner Calvert Vaux and other subsequent partners. Olmsted began his work in Buffalo in 1868. Today the majority of Olmsted's designs in Buffalo, including six major parks and eight connecting parkways, are substantially intact and represent one of the largest bodies of work by Olmsted. The Olmsted designed portions of the Buffalo park system are listed on the National Register of Historic Places.

Cultural Amenities

The County is unusually well endowed with cultural attractions. Over 25 museums and galleries display a wide variety of classic, contemporary and native art. Most notable is the Albright-Knox Art Gallery with a collection cited as "one of the world's top international surveys of contemporary painting and sculpture". Nearby is the Burchfield-Penny Art Center, recently relocated to a new 84,000 square foot building on the campus of Buffalo State College. The region also boasts outstanding examples of American architecture, including six Frank Lloyd Wright houses and the renown Guaranty Building by Louis Sullivan.

Buffalo's theater district is the largest concentration of theaters in New York State outside of New York City. The Buffalo Philharmonic is rated one of the best orchestras in the US and seasonal performing arts festivals, including those at the Chautauqua Institute, provide additional cultural offerings.

AREA ECONOMY

Economic History (through 2008)

Its strategic location on Lake Erie, bordering Canada and midway between Chicago and New York, has made the area a major trade center since the mid 1880's. Early in its development, the area owed its prosperity to industrial development combined with a strong agricultural base.

For the past 30+ years, the Erie County economy has been in a state of almost continuous transition from a manufacturing based economy to a service and trade based economy. During the 1970's there were significant employment losses in both durable and non-durable goods manufacturing; Between 1971 and 1981 the area lost over 18,000 manufacturing jobs 70% of which were in primary metals production. During the first half of the 1980's, structural shifts in the area's economy resulted in both high unemployment and outmigration (adding further to a decline in population resulting from lower birth rates). An increase in service sector and trade sector jobs in Erie County during the 1980's partially offset the loss of manufacturing jobs.

Net overall job growth in the latter part of the 1980's (15.4% between 1982 and 1989) was dampened by the recession of 1990 - 1992 which saw unemployment rates once again on the rise. There were 18,400 jobs lost in Erie County during that two year period. Nonetheless, during that recession the impact on Western New York was not as severe as in other parts of the State and employment declines here were only 40% of those of the State as a whole.

Erie County's economy experienced some recovery in the latter part of the 1990's, and, overall, employment declines had been generally moderate between 2000 and 2008. During this latter period, average annual unemployment rates in the County ranged from a high of 7.8% in 2000 to a low of 4.6% in 2007.

TABLE 4

Erie County Employment 1990 - 2008		
Year	Average Annual	% Change/year
2008	442	-0.45%
2007	444	-0.83%
2006	447.7	-0.02%
2005	447.8	0.45%
2004	445.8	0.68%
2003	442.8	-0.34%
2002	444.3	0.45%
2001	442.3	-1.47%
2000	448.9	1.26%
1999	443.3	-0.81%

Year	Average Annual	% Change/year
1998	446.9	-0.67%
1997	449.9	1.08%
1996	445.1	0.34%
1995	443.6	0.11%
1994	443.1	0.84%
1993	439.4	-0.23%
1992	440.4	-0.74%
1991	443.7	-2.10%
1990	453.2	

Percent change in jobs 1990 to 2008: -2.5%

Source: New York State Department of Labor

TABLE 5
AVERAGE EMPLOYMENT, UNEMPLOYMENT AND UNEMPLOYMENT RATES
1995 & 2008 - ERIE COUNTY, NEW YORK & NEW YORK STATE

	1995	2000	2005	2007	2008
ERIE COUNTY					
EMPLOYMENT	443.6	448.9	447.8	444.0	451.9
UNEMPLOYMENT	24.4	19.6	24.7	21.7	26.4
ERIE CO.UNEMPLOYMENT	4.9%	7.8%	5.2%	4.6%	5.5%
NYS UNEMPLOYMENT RATE	4.5%	3.9%	4.2%	4.6%	5.1%

Source: New York State Department of Labor

Industry Sectors

Historically, the area's economy was built on railroad commerce, steel manufacture, automobile production, Great Lakes shipping and grain storage. Many of these industries now have only a small presence, if any, in the County. In particular, with the shut down of Bethlehem Steel, Republic Steel, Donner Hanna Coke Company, among others, there are no longer major, integrated steel plants in Western New York. Until recently, Gibraltar Industries continued to manufacture, process and distribute steel products at two local plants. However, these operations have been or are in the process of being closed and only the company's headquarters remains in the County. The automotive industry, despite reductions in employment had, nevertheless, continued to make significant investments in local plants between 1998 and 2005. These included the Ford Stamping Plant in Hamburg and General Motors Powertrain in Tonawanda. The County continued to be a large rail center and, as a result, is attractive as a location for warehousing, storage and distribution facilities.

Traditionally a "blue collar" industrial community, the area now has an economy characterized by a mix of industrial, light manufacturing, high technology and service companies. Inasmuch as the economy is now far more diversified, it was thought to be more resilient to

economic dislocations, unlike the situation prior to 1980 when manufacturing employment was largely concentrated in the primary metals and transportation equipment sectors. In fact, the metro area experienced some growth through much of 2008 despite an ever-growing recession in the rest of the country.

Though no longer the dominant sector in the local economy and one that continues to contract, the manufacturing sector remains an important part of Erie County's economic base. In 2000 manufacturing jobs were 14% of all jobs in Erie County and in 2007 there were still close to 50,000 manufacturing jobs in the County (or just over 10% of total employment). Between 2000 and 2007, employment was reduced by 22.67% overall in manufacturing with the most substantial subsector losses in Transportation Equipment Manufacturing, Electrical Equipment and Appliances, and Food Manufacturing. During this same seven year period the following sectors grew by more than 10%: Finance and Insurance (particularly Financial Investment & Related and Insurance Carriers & Related); Management of Companies and Enterprises, Educational Services, and Nursing and Residential Care Facilities (a subsector of Health Care). Appendix A provides a breakdown of employment by sector and subsector in Erie County between 2000 and 2007. As of 2007 the largest employment sectors in Erie County were Government (16.9%), Health Care and Social Assistance (12.6%), Retail Trade (11.1%), Manufacturing (10.9%), Accommodation and Food Services (7.6%), Administrative and Waste Services (6.2%), Finance and Insurance (5.4%), Professional and Technical Services (5.2%) and Wholesale Trade (4.5%). As shown in Appendix B, the highest average annual wages are paid by a mix of both growing and shrinking sectors. According to the New York State Department of Labor:

...the Buffalo-Niagara Falls metro area continued to grow through much of 2008, while the rest of the nation sank into an ever-deepening recession. As recently as the third quarter of 2008, the metro area added 6,400 private sector jobs (1.4%) on a year-over-year basis. Job gains during 2008 were centered in leisure and hospitality, professional and business services, and financial activities. Losses occurred in natural resources, mining and construction and manufacturing.⁷

Employment by Sector information for 2009 indicates that among the County's largest employment sectors in 2007, only the Health Care and Social Assistance, Professional and Technical Services and Accommodation and Food Service sectors increased employment between 2007 and 2009.⁸

In 2008 the top fifteen largest private sector employers in Western New York, according to the Business First, 2008 Book of Lists, were:

Company	Industry	Fulltime Employees
Kaleida Health	Health Care	10,000
HSBC Bank USA N.A.	Commercial Bank	5,848
Catholic Health System	Health Care	4,949

⁷ Employment in Western New York, NYS Department of Labor

⁸ Quarterly Census of Employment and Wages, NYS Department of Labor

Company	Industry	Fulltime Employees
Employer Services Corp.	Employment-related Services	4,880
M&T Bank	Commercial Bank	4,820
Tops Markets LLC	Supermarket retailer	4,673
Seneca Gaming Corp.	Entertainment	4,020
Catholic Diocese of Buffalo	Parishes, schools and institutions	3,700
Wegmans Food Markets, Inc.	Supermarket retailer	3,288
Roswell Park Cancer Institute	Hospital	2,699
Elderwood Senior Care	Skilled Nursing facility	2,622
Dresser-Rand Co.	Mfg. of compressors, engines & steam turbines	2,400
Moog, Inc.	Mfg. of precision-control components & defense systems	2,370
People Inc.	Services to people with developmental disabilities	2,336
Wilson Farms Inc.	Convenience store	2,100

Source: Business First, 2008 Book of Lists

Canadian Investment

The Canadian-American Free Trade Agreement created interest and awareness of business opportunities on both sides of the border between Western New York and the Toronto metropolitan area. Western New York has benefited as a natural gateway into the United States for both Canadian shoppers and producers and, in recent years, has also been experiencing a "spillover" in business investment from Canadian companies escaping the crowded Toronto area and the high costs of doing business in Canada. Lower-cost industrial land, skilled, productive and reasonably-priced labor, tax incentives and the availability of excellent transportation facilities have all contributed to the attraction of Canadian investment to the area. Since 1989 over 500 Canadian companies have established a physical presence in Western New York (i.e., owned or rented an office or production facility and employed one or more local individuals). The direct employment generated by these companies has been estimated at nearly 15,000 jobs. Canadian investment in the area (both direct and in terms of retail shopping) explains in part why Western New York fared relatively better than the rest of New York State during some recessionary periods.

Recent Developments Impacting the Economy of Erie County

Buffalo and Erie County have increasingly become a center for bioinformatics and life sciences research including research carried out at the University of Buffalo, Hauptman-Woodward Medical Research Institute, and Roswell Park Cancer Institute. The Buffalo Niagara Medical Campus (BNMC) was established in 2001 as a partnership of the area's top clinical, research, and medical education institutions, the City of Buffalo, the County of Erie, the Allentown neighborhood and the Fruit Belt neighborhood. BNMC institutions have created a

master plan for the development of a world-class medical campus in downtown Buffalo. Partners include: Buffalo Hearing & Speech Center, Hauptman-Woodward Medical Research Institute, Buffalo Medical Group, Kaleida Health, Olmsted Center for Sight, Roswell Park Cancer Institute, The Center for Hospice & Palliative Care, University at Buffalo, and Upstate New York Transplant Services. Recent developments include the Buffalo Life Sciences Complex (BLSC) - three new structures adding over 400,000 square feet of state-of-the-art research space to the Buffalo Niagara Medical Campus. The BLSC is a partnership through the combined efforts of Roswell Park Cancer Institute, the University at Buffalo, and the Hauptman-Woodward Medical Research Institute:

- Hauptman-Woodward Medical Research Institute Structural Biology Research Center
Core facilities for high throughput protein production and purification, high throughput crystallization screening and optimization, and x-ray crystallography. Programs in structural and molecular biology, crystal growth, and methods development. New facility was completed in May 2005, currently houses 65 employees with plans to almost double in size over the next ten years.
- New York State Center of Excellence in Bioinformatics & Life Sciences at the University at Buffalo
Core facilities for molecular targeting, parallel chemistry, nanotechnology, protein arrays, and computational biology. Programs in bioinformatics, drug design, and imaging informatics. At full build-out will house approximately 200 employees, including 60 scientists
- Roswell Park Cancer Institute Center for Genetics and Pharmacology
Core facilities for gene chips, microarray, gene sequencing, confocal microscopy, and flow cytometry programs in genetics and pharmacology. At full build-out will house approximately 200 employees, including 60 scientists

The financial activities sector has a strong and growing presence in Erie County. Already the headquarters of M&T Bank, a Fortune 500 company, the County also is home to a major operations center for HSBC Bank USA and corporate operations facilities for Bank of America, Key Bank and Citigroup the latter having recently built a 90,000 sq.ft. facility in Amherst to house its global payments data center. In 2007 GEICO Insurance moved into a new 250,000 sq.ft., \$40 million operations center and expected to ultimately employ 2,500 people at its Amherst location (in 2009 GEICO announced plans to add new product lines at this facility and employ an additional 300 people as a result). A Minnesota-based health benefits company, Definity Health, opened a new service center in Tonawanda and HealthNow, the parent company of BlueCross BlueShield of Western New York occupied a new 425,000 square-foot headquarters in downtown Buffalo in the summer of 2007. The facility houses 1,300 employees and is one of the largest private sector investments in Buffalo in recent years.⁹

Since 2005 the Buffalo Niagara Falls region has been attracting more big-box retailers

⁹ Source: Employment in New York State, New York State Department of Labor Newsletter

including Lowe's and Kohl's. Other retailers have been expanding in the area including Wal-Mart, Sam's Club, Tops, Bed, Bath & Beyond and Wegmans Food Markets. Bass Pro Shops are proposing a retail operation on the Buffalo waterfront.

Though manufacturing is declining generally in the region, some local manufacturers have expanded in recent years including New Era Cap, which moved to a new headquarters in the former Federal Reserve Bank Building in Buffalo. Other expanding companies were Delaco Steel, Cobey, Wilson Greatbatch, Hydro Air and DuPont, among others.

Waterfront Development

The Buffalo and Erie County waterfront is being redeveloped and transformed from its industrial heritage into a locus for social and recreational activities and tourism. The Inner Harbor, has as attractions dinner/tour boats and historical naval vessels. The Outer Harbor is planned as an entertainment park and expanded small boat harbor. The Erie Canal Harbor was recently completed and opened to the public on July 2, 2008. Details of the project include the redevelopment of approximately 12.5 acres of prime waterfront property, as well as the restoration of the historically significant public space and maritime attraction, which was spearheaded by Empire State Development (ESD) and its subsidiary Erie Canal Harbor Development Corporation (ECHDC). Financing for the Erie Canal Harbor Redevelopment Project was obtained through a combination of federal, state, and local transportation funds.

STATE OF THE ERIE COUNTY ECONOMY – MID 2010

Reflective of global downturns in the economy, the April 2010 unemployment rate for Erie County stands at 7.5% which is below the rate for New York State as a whole (8.2%); the unemployment rate for the City of Buffalo, in April 2010, however, was at 9.4%. Both the Erie County and New York State unemployment rates are below the current U.S. average unemployment rate of 9.9% (April 2010). Unemployment in the larger Buffalo-Niagara Falls Metropolitan Statistical Area (MSA) is 7.8% (April 2010) compared to 8.2% one year earlier. Indicative of the dramatic impact of the current economic crisis on Erie County's economy, however, is the fact that in only three years since 1990 has the County's unemployment rate even exceeded 6 % (that was in 1991, 1992 and 1993); between 1990 and 2008, the highest unemployment rate in the County (7.3%) occurred in 1992.

According to John Slenker, Labor Market Analyst, Western New York, NYS Department of Labor:

...toward the end of 2008 the local economy began to weaken and the rate of job loss accelerated. Private sector employment in the Buffalo-Niagara Falls metro area decreased over the year by 13,600 or 2.9%, to 449,000 over the 12 months ending June 2009. Educational and health services jobs increased (+900). Losses occurred in manufacturing (-4,700), trade, transportation and utilities (-4,500), professional and business services (-2,100), natural resources, mining and construction (-2,000), financial activities (-500), information (-400), and leisure and hospitality (-300)¹⁰. (See Appendix C for August 2009 and April 2010 Nonfarm Employment by Industry in the Buffalo-Niagara Falls)

NYS Department of Labor statistics for the Buffalo-Niagara MSA have shown that, during 2009, despite some easing of the unemployment rate, the recession has taken a particularly heavy toll on manufacturing employment in the Buffalo-Niagara MSA. "More than three in four jobs lost in the Buffalo Niagara region came from local manufacturers and nearly one in 11 factory jobs in the region disappeared over the last year, with declines at the local auto plants accounting for a significant portion of the drop."¹¹ In March, 2010, Mr. Slenker from the NYS Department of Labor stated that

We are seeing the effects of a year-and-a-half of recession. This may have started out in the financial industry and the construction industry, but for Western New York, its turned into a classic manufacturing recession....

As noted earlier, auto-related production has historically been an important segment of the area's manufacturing sector. And it continues to have a larger proportion of local private sector jobs (1.6 %) than in the U.S. as a whole (0.9%) and pays well above average wages

¹⁰ New York State Department of Labor, Various Newsletters

¹¹ The Buffalo News, March 5, 2010

(\$93,000 in 2007). The recent economic downturn, compounded by a dramatic spike in U.S. fuel prices since the spring of 2008, has been particularly hard on this sector, creating additional hardship for the local economy. Sluggish demand in automobile sales has led to layoffs and furloughs at all automakers in the Buffalo-Niagara Falls region. Also, according to the NYS Department of Labor, "the downturn in the region's manufacturing sector has expanded beyond the automotive sector. For example, ...energy equipment producer Derrick Equipment Co. and toymaker Fisher Price have all announced layoffs during the past year." ¹² In 2009 closings and/or substantial reductions in employment have also been announced across a variety of sectors including shipping (American Steamship Co.), health insurance (Independent Health), traditional manufacturing (National Envelope) and high tech companies (e.g. NanoDynamics which focused on commercializing solid oxide fuel cells and water filtration technology).¹³

On a somewhat more positive note, our area was less impacted by the dramatic inflation in real estate prices, one of the causes of the current recession. Between 2001 and 2006 national housing prices increased by an average of 49% while housing prices in the Buffalo-Niagara metro area only rose by about 26%. "With housing prices not as overextended as they were elsewhere in the country, the region was partially insulated from the fallout related to the national downturn in housing prices. While construction employment was falling throughout the nation, 2008 was the local construction sector's strongest year since 2001." ¹⁴ The local sector then began to slow as several building projects scheduled for 2009 were delayed or cancelled.

A recent report by the Brookings Institution's Metropolitan Policy Program indicates that, relatively speaking, the Buffalo-Niagara Falls Metropolitan area is one of the stronger-performing among the 100 largest metropolitan areas in the U.S. based on some measures, including housing price changes, foreclosures and rate of employment loss in the second quarter of 2009. As a result of a 0% change in employment for the second quarter, only a slight increase in housing prices (3.7%) and a relatively modest foreclosure rate, the Buffalo-Niagara Falls MSA ranked 4th among the 100 largest metro areas in the country in terms of recent economic conditions (recession and recovery indicators). However, the region's performance in terms of decline in output (Gross Metropolitan Product) placed it among the weaker of the metropolitan areas for both the second quarter of 2009 and in terms of decline since an output peak in the third quarter of 2007. Appendix D provides the recent Brookings profile for the Buffalo-Niagara Falls MSA.¹⁵

Though the region may be to some degree more recession proof than many other parts of the country, the City of Buffalo remains one of the poorest cities in the U.S. according to federal statistics released in September 2009. As noted in a Buffalo News report dated September 30, 2009, "an estimated 30.3 percent of residents in Buffalo are poor, the third highest poverty rate in the nation among cities with more than 250,000 people...according to...statistics from the Census Bureau". Buffalo's ranking with regard to poverty rates, putting the city behind only Detroit and Cleveland, was the same in 2008.

¹² New York State Department of Labor, April 2009 Newsletter

¹³ The Buffalo News, September 22, 2009

¹⁴ NYS Department of Labor, April 2009 Newsletter

¹⁵ Brookings Institution, Metropolitan Policy Program. Metro Monitor, September 2009

Chapter 2

The Infrastructure of Economic Development

THE INFRASTRUCTURE OF ECONOMIC DEVELOPMENT
Building on Our Assets – Addressing Our Challenges
Labor, Land, and Capital

In the earlier, demographic information section of this CEDS, we provided information not only about the area’s population but also about Erie County’s location and quality of life characteristics. While those all must be taken into account relative to an economic strategy, the three primary factors (or infrastructure) for economic development are labor, land and capital. These are the three legs of the stool metaphorically speaking and strengths and weaknesses in each of these areas are fundamental considerations for building a viable strategic agenda. These factors are discussed in detail below.

Workforce

Labor Supply

The civilian labor force in Erie County is approximately 458,269¹ and the labor force in the two-county Buffalo-Niagara MSA is in excess of 583,800. Labor force participation in the region has generally been higher than participation in New York State. (The “labor force participation rate” is the ratio of an area’s civilian labor force [both employed and unemployed] to the population aged 16 years and older.) According to a 2005 report on the regional labor market prepared by the Wadley –Donovan Group², “the region has a number of significant assets that make it well prepared to adapt to a new economy.” Among these assets are the following:

- A well-educated workforce. In 2000 Erie County 82.9% of persons age 25+ were high school graduates (v. 79.1% for the State as a whole)³ and 24.5% had a bachelor’s degree or higher. **2008 estimates indicate that 88% of Erie county’s population age 25+ are at least high school graduates and 28.7% have a bachelor’s degree or better**
- A strong employment base in manufacturing which, according to the Wadley-Donovan study noted above, has resulted in a “high concentration of production and administrative skills”
- More than 25 post-secondary educational institutions within the region, graduating more than 21,000 students annually. Of these 11 are located in Erie County as follows:

Post-Secondary Institution	Enrollment (2007) ⁴
Trocaire College	1,061

¹ Data is for 2005 - 2007. Source: American Community Survey. U.S. Census Bureau
² Labor Market Assessment, Buffalo Niagara Enterprise Region. The Wadley-Donovan Group/GrowthTech, October 2005.
³ Data for 2000. Source: www.fedstats.gov
⁴ Enrollment data as shown on Buffalo Niagara Enterprise website

Villa Maria College	455
Post-Secondary Institution	Enrollment (2007)⁵
Erie Community College	13,053
Bryant and Stratton Business Institute	1,406
Hilbert College	1,046
Medaille College	2,929
Canisius College	4,984
D'Youville College	3,018
SUNY College at Buffalo	10,993
Daemen College	2,511
SUNY at Buffalo (UB)	28,054

- A good availability of a number of skills, as reported by Wadley-Donovan, including “desk clerks, accounting clerks, material-handling laborers, office clerks, unskilled manufacturing workers, bookkeepers, secretaries/administrative assistants, call center agents/representatives, senior CAD drafters, clerical workers with advanced computer skills, bench assemblers and engineers”
- According to employers surveyed by Wadley-Donovan, area workers have a strong work ethic, high productivity and highly rated basic and fundamental computer skills. Moreover, “employers report good labor/management relations despite the area’s image as being heavily unionized”⁶

A more recent study conducted by the University at Buffalo Regional Institute analyzed gaps between the supply of college graduates and workforce demand in Western New York .⁷ The primary findings of this study are as follows:

- There is a surplus of educated labor – there are fewer than 5,000 degree-requiring job openings per year as compared to the 16,000 annual graduates of WNY colleges and universities (college graduates and , particularly, those with masters degrees are affected most by this gap between supply and demand); jobs requiring an associates degree are expected to grow by about 15% between 2004 and 2014.
 - 75% of job openings in WNY require no college degree
 - The region produces “surplus” graduates in 16 out of the 20 occupational fields included in the study; a deficit of graduates is anticipated, however, for graduates in computers and mathematics, health care support, business and finance and life sciences. With respect to the latter, the study states that “Western New York’s life sciences cluster has placed the region on the cutting edge of the knowledge economy. Yet higher education in Western New York will fall short of the emerging industry’s demand for labor, producing 59 graduates compared to 80 life scientists and technician job openings annually through

⁵ Enrollment data as shown on Buffalo Niagara Enterprise website

⁶ Labor Market Assessment, Buffalo Niagara Enterprise Region. The Wadley-Donovan Group/GrowthTech, October 2005

⁷ Better by Degrees: The Knowledge Economy Workforce and Higher Education in Western New York: A Match-Gap Analysis.University at Buffalo Regional Institute

2014.” This is also true for life science support graduates in computer programming and in non-degree requiring biomanufacturing disciplines

- Several of the fields in which the region produces the highest number of graduates (e.g., education and business management) are the very same fields for which the local labor market is the tightest.

During 2010, the University of Buffalo Regional Institute and Buffalo Niagara Enterprise will be completing a more comprehensive labor market assessment than has been conducted in past years.

Impacts of Out-Migration and In-Migration on the Erie County Workforce

Though we often characterize the area’s economy as suffering from a “brain drain”, as documented in a 2007 article written by Richard Deitz of the Federal Reserve Bank of New York, Buffalo Branch, in reality Upstate New York had an out-migration rate (13.4%) for college –educated people between 1995 and 2000 that was similar to median out-migration rates across the nation. The in-migration rate for college-educated people coming into Upstate New York during the same period, however, was among the nation’s lowest (at 9.3%). This meant that Upstate New York’s net loss of college—educated people between the ages of 25 and 60 was 4.1%, the second worst in the nation if the region were a state. According to Deitz, “New York’s net outflow of college-educated workers reflects a lack of ‘brain gain’ rather than an unusually large ‘brain drain’. College-educated adults are not moving to the region fast enough to stem natural out-migration flows.”⁸ Though the cause of low in-migration is not known, Deitz states that research suggests that **both** job opportunities and local amenities are factors that play a role.

John Slenker, Labor Market Analyst, Western New York, New York State Department of Labor has also looked at state-to-state net migration (persons 5 years and older) on a county-by-county basis for 3,107 counties in the U.S. He found that Erie County has the second lowest out-migration rate (12%) among all New York State counties (the range for all NYS counties is 12% - 40%) **but also the second lowest in-migration rate** (7%) among all New York State counties (the in-migration range for all NYS counties is 7% - 34%). For Mr. Slenker, this indicates that it is not a matter of which job skills will be needed in the future, but rather that we will be experiencing significant reductions in labor supply across all education and skill levels as baby boomers retire and we fail to attract working age people to the area. Mr. Slenker doubts that increased job opportunities alone would have much impact on net migration rates (in that between 1970 and the current recession, the area has had job growth together with a net loss of population due to low rates of both in-migration and commutation.⁹ Further studies would be needed to understand the reason or reasons behind our comparatively low rates of in-migration and to develop strategies to address the problem.

Labor Costs

8 Upstate New York At a Glance, Newsletter Number 2, August 2007. Federal Reserve Bank of New York, Buffalo Branch.

9 Data provided by, and conversations with, John Slenker, NYS Department of Labor, Western New York Region.

Labor costs in the region are lower than in regions of similar size. Of particular interest, the 2005 Wadley-Donovan study of the area’s labor market found that the earnings differential between the ...”region and the state and national averages is particularly pronounced in several white-collar and professional sectors”. Average annual earnings in the information sector are 48% lower than New York (State) averages and 37% lower than national averages. Professional earnings are 44% lower than the state and 34% lower than national averages. Finance and insurance earnings are 27% below national averages and 64% below state averages (state averages are likely skewed by high earnings in New York City).....reported starting salaries for general business and office support occupations range between \$8.85/hr. and \$10.50/hr. Starting salaries for production and maintenance occupations range between \$7.40/hr. and \$13.35/hr. Starting salaries for computer and information systems positions range between \$24,960 and \$45,760¹⁰

Appendix E provides 2006 wage comparisons for several key occupational groups in the Buffalo-Niagara Falls MSA , Cleveland, Philadelphia and Boston and further illustrates the competitiveness of the area in terms of labor costs.

The breakdown of Erie County’s employed population by occupational category in 2000 and 2007 and a comparison of local wages with national median earnings is as follows:

Employed Persons 16 and over by Occupation, Erie County, NY	2000	2007	Percent of Total in 2007	Median Earnings (2007*) Erie County	Median Earnings (2007*) United States
Total Employed	431,174	426,580		\$30,958	\$31,266
Management/Business	52,572	52,534	12.3%	\$50,964	\$54,432
Professional & Related	78,634	99,092	23.2%	\$41,981	\$44,857
Health Care Practitioners and Technical Occupations	27,391	27,084	6.3%	\$42,835	\$47,519
Sales	48,624	50,230	11.8%	\$24,588	\$26,913
Office & Administrative Support	72,638	69,65	16.3%	\$26,267	\$26,457

¹⁰ Labor Market Assessment, Buffalo Niagara Enterprise Region. The Wadley-Donovan Group/GrowthTech, October 2005 Table 25 in the report provided median annual earnings data and we used this wage data to calculate the percentage comparisons with State and National earnings (we found the % calculations in Table 25 of the Assessment to be incorrect).

		1			
Service	67,285	75,844	17.8%	\$16,152	\$16,506
Employed Persons 16 and over by Occupation, Erie County, NY	2000	2007	Perce nt of Total in 2007	Median Earnings (2007*) Erie County	Median Earnings (2007*) United States
Production	37,416	29,045	6.8%	\$31,394	\$28,972
Transportation	25,377	22,966	5.3%	\$25,567	\$26,476
Construction	29,391	26,632	6.2%	\$37,963	\$32,594
Farm/Fishing/Forestry	1,269	586	0.13%	\$ 5,806	\$16,746

Source of 2000 data: New York Empire State Development

Source of 2007 data: American Fact Finder, U.S. Census Bureau

* In 2007 inflation-adjusted dollars

Between 2000 and 2007, there was an increase in the percentage of Professional and Related and Service employment but a decrease of note in Production occupations. Employment in other occupations shown stayed relatively the same proportionately to overall employment. In terms of median earnings, employed persons in Erie County are paid less than U.S. median earnings in all occupational groups listed with the exception of Production and Construction (a fact which might be in part attributable to higher percentages locally of unionized workers in these sectors).

Comparatively short commuting times within the region are both a quality of life and labor force asset. According to the U.S. Census Bureau, average travel time to work in the County is 21 minutes in comparison to 32 minutes for New York State as a whole.

Challenges Ahead:

In spite of our area's highly productive, relatively low cost and abundant labor supply, in Erie County there are, nevertheless, many challenges to maintaining a workforce that is in sync with the requirements of the marketplace in terms of education, skills, age and cost. As has been documented, in spite of the region's strong educational resources, there is a mismatch between current workforce demand and the number and types of graduates from regional colleges and universities. That said, it has also been documented that Erie County's outmigration rate is relatively low while immigration rates are significantly below

the national average, a fact which creates a net loss of college educated people. This, together with the problems associated with an aging, unemployed and underemployed remaining workforce lacking suitable technological skills is likely to further exacerbate the imbalance of labor supply and demand in the future.

Land and Buildings

A study initiated in 2005 by the National Vacant Properties Campaign identified one of the area's largest challenges as a "footprint too big for its needs", or, in other words, a "surplus of infrastructure and properties", particularly in the City of Buffalo, that "far outweighs the needs of (the City's) current population". As noted in the report that was produced as a result of this study, entitled "Blueprint Buffalo – Action Plan",¹¹

Although Buffalo's population is less than half of what it once was, the city still has roughly the same footprint of roads, housing, and commercial/industrial buildings....without intervention, many of these surplus properties will eventually become blighted...and other state and local policies to attract private and public reinvestments and rebuild Buffalo and the region will fail

The vacant properties study not only identified an extremely high residential, commercial and industrial vacancy rate in the City of Buffalo but also found a strong indication that long-term or chronic vacancy (residential, commercial and industrial) has been spreading beyond the city limits into the older, first ring, suburban communities including Lackawanna, Cheektowaga and Tonawanda. Housing vacancy rates in the urban core and older suburbs result from both outmigration from the region and, to "the steady, yet not spectacular, growth" and new construction in outlying areas where recently built, low-density, developments "continue to consume more of the region's farmland".¹² Since 1995, the City of Buffalo has spent millions of dollars on the demolition of vacant, blighted properties, a strategy which can be expected to only partially address the problem; the 2000 Census identified 23,000 vacant housing units in the City and another 16,000 within the region.

Industrial and Commercial Sites

Although there remain 120,000 acres of undeveloped land in Erie County¹³ only approximately 50% of this undeveloped property is served by public sewers. The **Framework for Regional Growth** included a 2006 inventory of sites available for industrial and commercial investment which indicated that the County had, at that time, approximately 1,000 acres of vacant property served by public utilities and an additional

¹¹ Blueprint Buffalo - Action Plan: Regional Strategies and Local Tools for Reclaiming Vacant Properties in the City and Suburbs of Buffalo. National Vacant Properties Campaign. 2006- 2007.

¹² Ibid.

¹³ Undeveloped Land in this regard does not include public parklands, cemeteries, quarries, wetlands, floodplains or steep slopes, land in designated Agricultural Districts. Source: Framework for Regional Growth, Chapter 2

1,644 acres in “sites being prepared for investment”, including Brownfield sites (see Appendix F). Today there may be fewer than 800 acres of vacant land in large-scale sites or industrial parks that are considered shovel ready for industrial or commercial development. Despite public and private efforts to date to provide a variety of shovel ready sites and to reclaim brownfields, the latter, primarily, though not exclusively, in the urban core, the portfolio of currently available, prepared sites **is not considered sufficient for a healthy market position**. The status of primary industrial sites are shown on the following list:

Industrial Park Inventory - Erie County September-2009				
Industrial Park	Location	Total Acres	Available Acres	Status
Aero Business Park	Cheektowaga	3 1	10	Shovel Ready
Airbourne Business Park	Cheektowaga	6 4	45	Shovel Ready
Albright Court-Amadori Site	Lackawanna	2 2	10	Shovel Ready
Buffalo Lakeside Commerce Park	Buffalo	2 25	10 0	Shovel Ready
Camp Road Center	Hamburg	7 2	72	No Internal Infrastructure
Central Park Plaza	Buffalo	2 5	25	Abandoned structures
College Park	Amherst	7 2	10	Shovel Ready
Colvin Woods	T.of Tonawanda	4 0	20	Shovel Ready
Commerce Green Industrial Park	East Aurora	4 7	15	Shovel Ready
CrossPoint Business Park	Amherst	1 68	50	Shovel Ready
Eastport Commerce Center	Lancaster	1 16	11 6	Shovel Ready
Eden Industrial Site	Eden	4 0	10	Partially Shovel Ready
Evans Industrial Site	Evans	1 38	13 8	Preliminary Engineering completed
Grand Island Gateway Center	Grand Island	1 70	17 0	Preliminary Engineering completed
ISG - Bethlehem	Lackawanna	1 ,1 59	1,1 59	Brownfield – partially remediated

Lake Erie Industrial Park	Hamburg	1 33	13 3	Partially Shovel Ready
Lancaster Site - RR	Lancaster	1 88	18 8	Preliminary Engineering completed
Lancaster Village Industrial Park	Lancaster	8 3	8	Shovel Ready
Industrial Park	Location	Total Acres	Available Acres	Status
Muir Woods	Amherst	1 50	15 0	No Internal Infrastructure
North America Center	West Seneca	4 41	22 5	Shovel Ready
North Youngmann Commerce Center	T.of Tonawanda	8 0	80	No Internal Infrastructure
Quaker Center	Orchard Park	1 67	25	Shovel Ready
Ravenwood Park North	Hamburg	1 67	20	Shovel Ready
Riverview	T.of Tonawanda	1 80	16 0	Partially Shovel Ready
Spaulding Site	City of Tonawanda	4 7	47	Brownfield – under remediation
Steelfields	Buffalo	1 80	15 0	Partially Shovel Ready
Sterling Park (formerly Orchard Park Commerce Center)	Orchard Park	1 35	70	Shovel Ready
Tonawanda Street Corridor	Buffalo	1 21	12 1	Brownfield
Walden Commerce Exchange	Cheektowaga	4 7	30	Shovel Ready
Whiting Industrial Park	Newstead	4 6	15	Shovel Ready
Totals:		4, 55 4. 00	3,37 2.00	
Vacant and Shovel Ready:			76 1	

Source: County of Erie Department of Environment and Planning, updated by editor

The cost of vacant land varies across the County. Shovel ready sites in an urban industrial park such as Buffalo Lakeside Commerce Park, for example, will cost approximately

\$45,000 per acre for a larger site (20 acres) and \$56,000+ per acre for a smaller site (around 2 acres). Land in a suburban industrial park can cost \$35,000 and up.

Industrial and Commercial Buildings



There is a significant amount of available office and industrial space located throughout the County. One recently produced inventory¹⁴ indicates that there are **over 9.2 million square feet of vacant office space** (out of a total inventory of 48.1 million square feet of office space) and **over 16.1 million square feet of available industrial space** (out of a total inventory of over 100.8 million square feet of industrial space) in Erie County. The 2009 breakdown of this inventory by municipality is shown in Appendix G. 40.8% of total office space and 42% of total industrial space is located in the City of Buffalo. Although **there is a high vacancy rate in office space** in each of the municipalities listed (with the exception of the Town of Grand Island), over 41% of the total amount of vacant office space inventoried is in the City of Buffalo and 21% of the vacant office space is in the Town of Amherst. Vacancy rates for industrial space vary significantly from municipality to municipality and, **although the City of Buffalo is by no means the only municipality with an industrial vacancy rate of 20% or greater, approximately 52.8% of all vacant industrial space is located in the City of Buffalo.** The degree to which municipal differences can be explained by disparities in the age, class and condition of available office and industrial stock rather than differences in demand cannot be evaluated.

Another inventory of office and industrial space¹⁵, produced by CB Richard Ellis, tracked approximately 65 million total sq.ft. of industrial space in the county and found an overall “manageable” vacancy rate of 9.5% (as of late 2008). This inventory too found an over 20% vacancy rate for industrial space within the City “submarket” but indicated that the high rate is somewhat skewed by the closing of the American Axle manufacturing plant in 2008 which put 1.265 million sq.ft. out of productive use. The CB Richard Ellis analysis also noted a relative “lack of new construction” in the industrial market in 2008 with the exception of two large projects, the 300,000 sq.ft. Sonwil Distribution Center at Buffalo Lakeside Commerce Park (balanced, however, by the vacating of 360,000 sq.ft. in the NFTA’s Terminal A building) and the construction of a 104,000 sq.ft. office/warehouse in Riverview Business Park in the Town of Tonawanda. Although much of the new Class A and Class B office space constructed in 2008 was in suburban markets, even the City experienced some growth in Class A office space with the construction of the Avant project by Uniland Development Corporation. However, only 800,000 sq.ft. of a projected 1.4 million sq.ft. of office construction was actually completed in 2008, according to CB

¹⁴ J.R. Militello Realty, Inc., Annual Survey, 2009

¹⁵ CB Richard Ellis. MarketView Buffalo Industrial. Annual 2008/2009

Richard Ellis; some of that backlog is projected for completion in 2009 -2010 including the Genesee Gateway mixed use complex, the continued development of the Buffalo Niagara Medical Campus and a new Federal Courthouse, all in the CBD. Cessation of the renovation of the Statler Towers in downtown Buffalo, however, accounted for some of the drop in construction previously anticipated for 2008 - 2009.¹⁶



Under Construction
New Federal Courthouse
Downtown Buffalo



Avant Project
Hotel, Condos, Office Space
Downtown Buffalo

AM&A's Building
Future Adaptive Reuse
Downtown Buffalo

In terms of facility cost, the Buffalo region is an attractive place in which to build or lease commercial or industrial space. High vacancy rates and relatively low rental rates exist throughout the County. In the downtown core of the City of Buffalo, Class A office space rents for between \$19.00 and \$33.00/square foot. Downtown Class B office space rents range from \$14.00 to \$17.00 per square foot.

Greyfields and Brownfields



Eastern States Grain Mills, Town of Tonawanda – Then and Now

To some extent the seemingly contradictory facts of a relatively high inventory of vacant commercial and industrial space and additional Class A and B due in part to the fact that there are a significant number of greyfield and brownfield properties in Erie County. A “greyfield” is defined as a vacant or under-performing commercial property such as a shopping mall or strip commercial property. “Brownfields” are defined by the U.S. Environmental Protection



and the need for additional shovel ready land office and manufacturing “flex” space, is a significant number of greyfield and County. A “greyfield” is defined as a vacant or under-performing commercial property such as a shopping mall or strip commercial property. “Brownfields” are defined by the U.S. Environmental Protection Agency as “real property where the actual

presence or potential presence of hazardous substances, pollution or contaminants may complicate expansion, redevelopment, or reuse of the site.”¹⁷ As a result of the area’s industrial legacy, the most significant brownfields in the County are concentrated in South Buffalo, Lackawanna and in the Tonawandas, in close proximity to, or along the shorelines of, Lake Erie and the Niagara River. Greyfield properties are found in both urban and suburban commercial areas. According to **Blueprint Buffalo** “many of the region’s suburban plazas and strip malls were built between the 1950s and 1970s. As these buildings become older, obsolete, and less attractive, they could continue to lose economic value and eventually become chronic vacant properties that pose public nuisances.” The challenge with respect to both brownfields and greyfields is that, in the absence of a regional land use inventory and strategy, market demand may not be sufficient to ensure that new commercial and industrial development does not occur at the expense of areas in which vacancies are growing and where, as a result of sprawl and population shifts, redevelopment and reinvestment will be unlikely.

Over the past decade, the public sector throughout Erie County has had significant and increasing involvement in the conversion of brownfields to shovel-ready sites, an economic development strategy that is likely to continue well into the future. The chart on the following page provides data on a number of brownfield projects completed or currently underway in Erie County:

Remediation of Brownfields in Erie County						
Project Name	Location	Acres	Date Remediated	Cost (millions)	Former Use	Present Use
Buffalo Lakeside Commerce Park	City of Buffalo	12	2001 - 2005	\$ 8	Hanna Furnace Iron Works	Industrial Park
Lackawanna Foundry	City of Lackawanna	4	1999 - 2000	\$ 1	Iron foundry	Recreational Park
Amadori/Albright Site	City of Lackawanna	22	2001 - 2002	\$.8	Low income housing and construction storage yard	Industrial Park
Fillmore Avenue	City of Tonawanda	2	2002 - 2003	\$.5	Solvent recovery facility	Industrial
Spaulding Fibre	City of Tonawanda	46	2004 - 2010	\$ 20	Fibreboard mfg. company	Light Industrial/Office/Commercial

Excelsior Steel	Town of Tonawanda	2. 2	2003 - 2004	\$.3	Ball bearing plant	Open Space
Eastern States Grain Mill	Town of Tonawanda	4	2000 - 2002	\$ 2.3	Grain mill and silos	Available for industrial reuse
Madison Wire	Town of West Seneca	7	1997 - 1999	\$ 6.5	Wire works factory	Recreational Park

Challenges Ahead:

By way of summary, we are both blessed and cursed with a surplus of infrastructure and properties particularly within the more urbanized areas of the County. While we have a large inventory of industrial and commercial sites throughout the County, much of the vacant land is either not served by public utilities or in need of expensive environmental remediation. Where we have extensive, underutilized utilities (i.e., the urbanized areas) is also where we are most likely to find the highest share of abandoned or underutilized brownfield and “greyfield” properties. Similarly, though we have a significant inventory of available office and industrial space, a good deal of this space is obsolete (i.e., built prior to 1950) or difficult and expensive to retrofit to meet the needs of today’s industrial and commercial markets or as a result of historic preservation requirements. This creates a seeming contradiction – relatively high inventories of industrial and commercial land and buildings at the same time as we have a need for more modern facilities and shovel-ready sites.

A number of brownfield, greyfield and otherwise challenged, blighted, underutilized sites remain on the County’s wish list for remedial action and funding. Among these are several properties along River Road in the Town of Tonawanda, the Duriron property in the Town of Evans, the Emblem Bicycle factory property in the Village of Angola, and the City Water Works/Sewer Plant site in the City of Tonawanda.

Even in the more newly developed suburban communities, greyfields and brownfields have resulted from abandonment or disinvestment. In 2005 the Amherst Industrial Development Agency (AIDA) received a small grant through the New York State Brownfield Opportunity Area (BOA) Program to conduct a study of the Sheridan Drive Commercial District, one of the Town’s more mature commercial areas characterized by numerous vacant and underutilized properties. The Study recommended a series of steps that could be taken by the Amherst IDA and/or the Town to assist in the revitalization of this BOA including business development, environmental, design and regulatory measures.

Most of the County’s most compromised properties (vacant, contaminated, blighted, etc.) are located in the City of Buffalo. In recent years there has been significant attention given to the remediation and redevelopment of brownfields in the City. These activities are covered in detail in Section 3.3 of Chapter 3 (Brownfield Opportunity Areas)

Heavy competition for dwindling federal and state resources available for the remediation of brownfields and for clean-up of hazardous waste sites create additional challenges for economic redevelopment in Erie County. The list of sites is long and new resources need to

be identified to deal with the impact of vacant properties, greyfields and brownfields.

Capital

Collectively, the economic development agencies in Erie County offer a wide variety of financial incentives to businesses, ranging from small loans and grants for neighborhood, start-up, minority and women-owned businesses to substantial incentives (in the form of grants, tax abatement, and tax credits) for large-scale, high-impact projects. Local efforts have also leveraged hundreds of millions of dollars of economic assistance from State and federal sources over the past several decades. One, but not the only, indication of the extent to which businesses in Erie County have been assisted by public financing programs is found in the information presented below regarding the financing activities of the Erie County Industrial Development Agency since 1970. Although there are 6 industrial development agencies in the County, the largest, in terms of financial assistance and jurisdiction, is the Erie County Industrial Development Agency (ECIDA) which covers all of the County, including the three cities of Buffalo, Lackawanna and Tonawanda, and all the County's towns and villages with the exception of the towns of Amherst, Clarence, Concord, Hamburg and Lancaster which have their own industrial development agencies. In addition to tax incentives offered by IDA's, the ECIDA and the City of Buffalo also offer a number of lending programs as described in detail below.

Tax Incentives

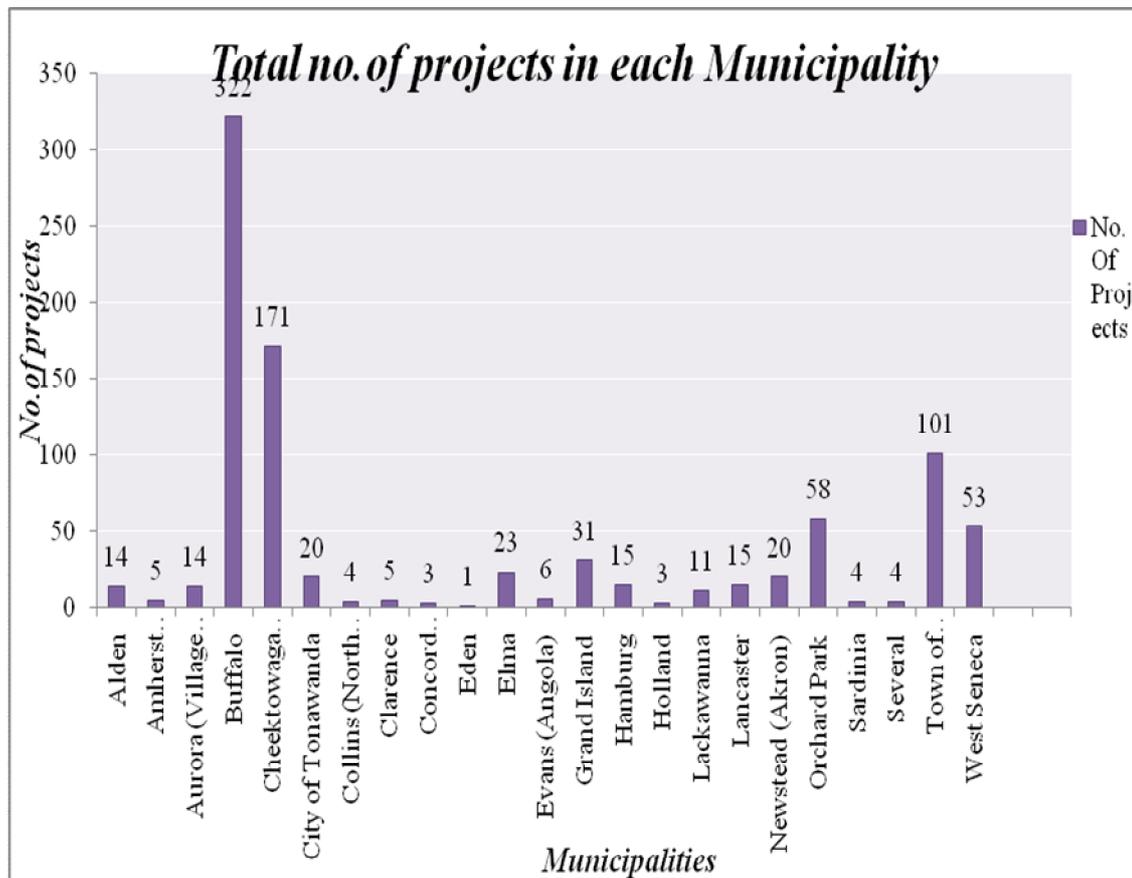
The primary mechanism for assisting eligible businesses to grow and expand in Erie County are the tax incentive programs offered under a uniform eligibility policy by all 6 IDA's in the County. Through the issuance of industrial development bonds and leases, the IDA's offer local property tax abatement, exemption from sales tax on non-production equipment purchases and on construction costs and mortgage recording tax exemptions. The ECIDA has been in operation since 1970 and, since that date, has issued bonds and leases for 903¹⁸ projects having a total investment value of over \$6.1 billion.

Projects Assisted by ECIDA between 1970 and 2009

Project Municipality	No. of Projects	Total Investment
Alden	14	\$38,479,607
Amherst (Williamsville)	5	\$101,905,969
Aurora (Village of East Aurora)	14	\$68,262,424
Buffalo	322	\$3,041,441,175
Cheektowaga (Depew)	171	\$408,288,314
City of Tonawanda	20	\$49,773,400

¹⁸ 903 is the total number of projects not companies assisted since a number of companies have had more than one project over the 39 year period.

Collins (North Collins)	4	\$4,043,393
Clarence	5	\$4,700,000
Concord (Springville)	3	\$7,100,000
Eden	1	\$250,000
Elma	23	\$102,611,696
Evans (Angola)	6	\$19,640,774
Grand Island	31	\$96,866,617
Hamburg	15	\$19,646,000
Holland	3	\$9,640,000
Lackawanna	11	\$156,415,000
Lancaster	15	\$21,911,000
Newstead (Akron)	20	\$37,701,791
Orchard Park	58	\$195,446,644
Sardinia	4	\$8,111,520
Several (projects with several locations)	4	\$82,889,659
Town of Tonawanda (Kenmore)	101	\$1,404,684,333
West Seneca	53	\$232,174,117
Totals:	903	\$6,111,983,433



Source: Projects are those of ECIDA between 1971 and 2009

As shown on the above table and chart, by far the highest number of projects assisted through ECIDA's tax abatement program, are located in the City of Buffalo (35.6%), or in the first ring suburbs of Cheektowaga (18.9%) and Town of Tonawanda (11.1%). The Town of Amherst is also a "first-ring" suburb of Buffalo, but most projects in Amherst are assisted by the Amherst IDA. The Amherst Industrial Development Agency (AIDA) has historically had the second highest volume of projects of the 6 IDA's in the County. Since 1972 AIDA has provided tax incentives that have resulted in the creation and retention of approximately 35,000 jobs and over \$2 billion in new investment in Amherst. Although the recent economic recession did not impact the Town of Amherst in terms of unemployment to the extent that the City of Buffalo and other parts of the region were affected, in 2009 AIDA and Amherst did experience a downturn in the number of private investment projects proposed; although AIDA average volume of projects in previous years was 16 projects totaling approximately \$72 million annually, only 7 projects totaling \$20.6 million were approved by AIDA in 2009. These 2009-assisted projects were primarily in the Professional, Scientific and Technical and Health Service sectors which have historically been strong growth sectors within the town.

As shown in the table below, approximately 48% of the companies assisted with ECIDA bonds and leases (tax abatement) were manufacturing; the second highest number of companies sponsored real estate projects (generally multi-tenant buildings for, commercial office or light industrial space).

**Companies Assisted by ECIDA - by Type
1971 - 2009**

NAICS code	Description	No.of companies	Total Investment
31111-339999	Manufacturing	426	\$ 2,500,000
53111-533110	Real Estate and Rental and Leasing	161	\$ 604,922,735
42311-425120	Wholesale Trade	49	\$ 117,000,179
48111-493190	Transportation and warehousing	40	\$ 83,960,042
61111-611710	Health Care and Social Assistance	30	\$ 317,669,553
54111-541990	Professional, Scientific and Technical Services	25	\$ 46,065,429
23611-238990	Construction	23	\$ 24,369,818
44111-454390	Retail Trade	21	\$ 40,453,145
81111-814110	Other services (except Public administration)	21	\$ 34,306,794
52111-525990	Finance and Insurance	18	\$ 529,325,332
72111-722410	Accommodation and Food services	16	\$ 124,126,241
51111-519190	Information	13	\$ 101,058,511
61111-611710	Educational Services	12	\$ 942,730,000
56111-562998	Administrative and Support and Waste Management and Remediation Services	10	\$ 17,810,594
71111-713990	Arts, Entertainment and Recreation	8	\$ 139,737,000
22111-221330	Utilities	4	\$ 302,540,250
92111-928120	Public Administration	3	\$ 36,150,000
21111-213115	Mining	1	\$ 2,500,000

Tax Incentives for Civic Facilities

Prior to January 2008, industrial development agencies were authorized under New York State law to facilitate issuance of (federally) tax exempt debt for not-for-profit entities (also called “Civic Facilities”), including, but not limited to, social services, educational and healthcare organizations. As a response to the expiration of that authority, the Erie County Legislature, in July 2009, designated the Buffalo and Erie County Industrial Land Development Corporation (ILDC), a Local Development Corporation, to act on behalf of the County for the purpose of issuing tax exempt bonds. The ILDC, staffed by ECIDA, also

offers other forms of financial assistance (see below).

Lending Programs:

The largest sources of public funding for business loans in the County are available through the Buffalo and Erie County Regional Development Corporation (RDC) and the Buffalo and Erie County Industrial Land Development Corporation (ILDC), both of which are part of the Erie County Industrial Development Agency’s group of affiliated corporations and staffed by the ECIDA, and several lending programs operated by the City of Buffalo’s Buffalo Economic Renaissance Corporation (BERC).

Buffalo and Erie County Regional Development Corporation (RDC)

The RDC was incorporated in 1979. It manages one of the largest revolving loan programs not only in the County but also in the entire country. \$7 million in seed money for the RDC’s revolving loan fund was provided by the U.S. Department of Commerce, Economic Development Administration with matching contributions of \$2.316 million and \$1.8 million from the County of Erie and City of Buffalo respectively. The RDC makes term loans to individual companies in target businesses and target areas in the County. Loans are generally made for the purpose of permanent working capital, equipment purchases, pollution control improvements and/or loans to effect changes in local ownership when the employment base of the company would otherwise be at risk. Loan amounts generally range from \$25,000 to \$1 million and may not exceed 50% of a project or \$50,000 per job created or retained over a three year period. Since its establishment the RDC has made 540 loans totaling in excess of \$93 million. A study of the RDC completed in February 2009, indicated the following regarding 520 loans which was the total of all loans made between 1979 and the end of 2008:

**Top 6 Industries to Which Loans Were Made
(in all other categories, fewer than 20 loans were made)**

SIC Code	Industry Description	# of Loans
7000-8999	Services	99
3500-3599	Industrial and Commercial machinery and computer equipment	47
5200-5999	Retail Trade	31
3400-3499	Fabricated Metal Products	30
5000-5199	Wholesale Trade	30
2700-2799	Printing, Publishing and Allied Industries	20

Type of Beneficiary	No. of Loans	Total Loan Amounts
Start-Up Operations	175	\$17,357,546
Second Stage Operations	250	\$47,896,896
Buy-Outs	87	\$21,033,042
Reorganizations	9	\$1,815,000

Type of Loan	No. of Loans	Total Loan Amounts
Working Capital	458	\$74,312,089
Machinery and Equipment	37	\$8,272,790
Real Estate	26	\$5,392,605
Pollution Control	1	\$125,000

The RDC also has managed a number of Strategic Loan Funds targeted to specific groups. For example, in 1993, the 50/50 and 65/35 Minority, Women & Start-Up Strategic Loan Fund was set up to provide financial support to minority, women-owned and start-up businesses within Erie County. Priorities are given to targeted growth industries and businesses located in distressed areas within the County. Financing for this strategic fund comes from the RDC and banks, with the US. Small Business Administration (SBA) providing a guaranty of 75% to 85% depending on the amount of the loan. Loans can range from \$25,000 - \$250,000 and are made for the same general purposes as the RDC loan program. Between 1993 and 2008 133 loans totaling \$7,640,302 were made from the 50/50 and 65/35 fund. Other Strategic Loan Funds were set up for (1) contract financing for small companies that were awarded contracts but were unable to obtain bank financing to meet the need for interim funding in order to perform on the contract (6 loans were made totaling \$450,000), and (2) for venture capital. The Niagara Region Ventures Fund provides assistance in the form of near-equity funding for start-up, early state and expansion stage technology-based companies that offer above average opportunity for growth in terms of revenue and employment. The venture funds cannot exceed 40% of total financing or \$100,000 per full time job created over a three year period. Loans may be made up to 10 years and will generally require warrants or other non-equity “kickers”. Eligible companies must have a technology product or service that is already substantially developed and expected to generate commercial revenues within 12 months. Priority is given to companies using technologies developed at local colleges, universities, medical and research facilities and to businesses that have previously received venture funding from other public agencies.

RDC lending activity between 2004 and year end 2009 was as follows:

Year	Number of Loans	Total Amount Loaned (in millions)

2004	32	\$ 7.908
2005	19	\$ 4.056
2006	10	\$ 1.687
2007	2	\$ 2.300
2008	17	\$ 3.094
2009	20	\$ 5.186

Taking into account the 8 projects not closed as of yearend 2009 for which the RDC has made commitments totaling \$1.447 million, together with two projects in the pipeline for loans (totaling an additional \$750,000), the RDC could soon have a balance of available funds of **a mere \$722,000** (not including reflow) – the **lowest fund balance** in decades.

Buffalo and Erie County Industrial Land Development Corporation (ILDC)

This corporation was established for the purpose of participating in the acquisition and development of industrial sites and for providing financial assistance for the acquisition or renovation of fixed assets by individual companies locating or expanding in the County. The ILDC manages the Erie County Business Development Fund (BDF) – a revolving loan fund program for businesses in Erie County consortium communities which includes all Erie County cities and town except Amherst, Buffalo, Cheektowaga, Hamburg and the Town of Tonawanda (these five have separate loan programs). The BDF gives priority to targeted manufacturing, transportation, wholesale trade and service industries in conjunction with conventional financing and will not exceed 33% of project financing and can range from \$15,000 to \$100,000. For every \$15,000 lent at least one full-time job must be created. BDF loans can be used for permanent working capital, acquisition of machinery and equipment, pollution control and related improvements where funds extended are sufficient to bring the borrower into full compliance, to effect a change in ownership in extraordinary cases where it can be demonstrated that the employment base of a company is at risk, and in acquisition, development or rehabilitation of land, buildings and facilities.

Buffalo Economic Renaissance Corporation – Lending Programs

A restructuring of the lending programs offered through the Buffalo Economic Renaissance Corporation is currently taking place with the Buffalo Urban Renewal Agency (BURA).

Lending programs may be similar to those outlined below.

Program Name	Eligible Businesses	Loan Amounts	Purpose of Loans
Minority and Women Business Enterprise Contractor Term Loan/Line of Credit	City of Buffalo M/WBE construction and building trade businesses	\$10,000 - \$50,000 for term loans and \$10,000 to \$200,000 for lines of credit	Working capital, purchase of materials, lease of machinery and equipment
Business Loan Program	Businesses located or	\$50,001 - \$300,000	Improving, renovating or acquiring commercial or

	expanding within the City of Buffalo	(up to 50% of a project with matching loan financing required)	mixed-use real estate, business acquisitions, demolition costs, soft costs, purchase of FF&E, machinery, equipment, inventory and for permanent working capital
Neighborhood Micro Enterprise Loan Program	Businesses located or expanding within the City of Buffalo	\$2,500 - \$50,000 10% equity required	Same as Business Loan Program
Micro Loan Program (offered in partnership with the Buffalo and Erie County RDC)	Businesses located or expanding within the City of Buffalo	\$1,000 - \$10,000 10% equity required	Same as Business Loan Program
Commercial Area Revitalization Effort Program (CARE)	Business located in one of six CARE Areas – Jefferson Avenue, Lower Niagara Street, Grant/Ferry, Broadway/Fillmore, Seneca Street and Fillmore/Leroy	Grants and loans	Storefront façade and security improvement grants and rehabilitation loans

Other Incentive Programs

Export Assistance

In addition to tax abatement and the lending programs offered locally, the Erie County Industrial Development Agency also has financial products that support the exporting operations of businesses in Western New York . As an approved Ex-Im Bank broker and Ex-Im Delegated Authority Lender, ECIDA can provide exporters with working capital financing, credit insurance, loans to foreign buyers, technical assistance (trade missions and the like), and through the operation of Foreign Trade Zones.

Empire Zones

Designated New York State Empire Zones have existed in the more distressed areas of the City of Buffalo, Town of Tonawanda, City of Lackawanna and City of Tonawanda since 2000. At one time, the program was perhaps the State's most popular economic development program in that it offered extensive tax credit and other financial incentives to businesses locating in such Empire Zones. As a result of alleged abuses, however, the Empire Zone Program, has already been revised to be more restrictive than originally structured and, in fact, sunsets on June 30, 2010. In its place, the State Legislature has adopted the Excelsior Jobs Program to provide incentives over a five year period to firms in targeted industries such as biotechnology, pharmaceutical, high-tech, clean-technology, green technology, financial services, agriculture and manufacturing. The Excelsior Program will offer four kinds of refundable tax credits for firms able to meet specific job and investment thresholds. Some of the program funds are reserved for companies having a minimum of 50 employees and planning to make significant new capital investment if the proposed investment can meet a benefit-cost ratio of \$10 of investment and new wages for every \$1 of tax credit. It is believed that for WNY, the Excelsior Program will not offer the level of incentives to as broad a range of businesses as the EZ Program.

Renewal Community Incentives

The Buffalo-Lackawanna Renewal Community, one of 40 designees (one of five in NYS) selected by the Department of Housing and Urban Development (HUD), is 11 square miles that include sections of the Lower West Side, East Side, Downtown, Seneca-Babcock, Broadway-Fillmore, the former Republic Steel area of South Buffalo and the First Ward in Lackawanna. Potential benefits to businesses located in a Renewal Community include the following:

- **Commercial Revitalization Deduction (CRD) Accelerated Depreciation** - Deduction of either one-half of qualified revitalization expenditures in the first year a building is placed in service or all of qualified revitalization expenditures over 10 years for revitalization of a commercial building located in an RC. An annual allocation of \$12 million (no more than \$10 million per project) is available to the Buffalo-Lackawanna Renewal Community.
- **Work Opportunity Tax Credits** - businesses can receive credit against federal

taxes of up to \$2,400 per year for each new hire from traditionally high unemployment groups who live within the zone.

- **Zero % Capital Gains Rate** - Property holders within the zone will not have to claim income on the sale or exchange of the property. Property must be held for a minimum of five years.
- **Wage Tax Credit** - businesses can receive credit against federal taxes of up to \$1,500 per year for every employee and new hire who lives within the Renewal Community Zone

Challenges Ahead:

The Buffalo area bank industry today can be characterized as conservative yet competitive. The competitive nature of the banking environment has forced banks to standardize products and reduce overhead using means such as credit scoring, regional loan processing centers and fewer relationship managers handling more loans. The competitive nature of the banking industry has expanded the opportunities of many high quality smaller firms who formerly would have borrowed from the RLF or other financing sources. It has however also left many smaller firms whose financing requirements come with a “story” on the outside looking for financing. In particular, start-up and developing small businesses are less likely to find sufficient financing available.

Historically, a depressed manufacturing sector and a large surplus of industrial real estate has reduced collateral values of many of the area’s manufacturing companies fixed assets. This in turn, has adversely affected the ability of local businesses to leverage fixed asset financing and has made it difficult for local companies to rely solely on bank loans for expansion financing.

The financial/banking crisis which developed in 2009 further impacted the banking environment and businesses’ ability to borrow. In 2009, several local banks changed underwriting standards in the face of difficult economic conditions. Loan/value ratios for real estate and equipment have been reduced thereby affecting the amount companies are able to leverage with bank financing for expansion projects. In addition banks are taking a much harder credit look at many companies and industries and are applying much more rigid underwriting standards. These changes have resulted in an increased focus on alternative banking sources, in particular the RDC.

In recent years major investments have been made by the State, local governments and private individuals to focus and accelerate development of technology companies, and specifically life science companies, in Erie County. A February 2008 report prepared by Judy Albers of Excell Ventures (Rochester, NY) indicates:

1. In 2006, New York State university R&D expenditures totaled \$3,789 million—the 2nd highest in the United States. The belief is that the level of R&D expenditures is a predictor of the level of technology creation and innovation.
2. In 2007 the total capital deployed by New York State venture capital firms was \$2,828 million but only \$250 million or 9% remained in the State.

3. In 2006, the National Association for Seed and Venture Funds (NASVF) conducted a survey called “State Commitments to Current Capital Programs”. Their focus was on programs that provided funding primarily for technology commercialization and start-up to later stage capitalization. This included capital programs that provide research, pre-seed, seed, venture, mezzanine and late stage capital, grants and development loans. New York State ranked 25th.

New York State has a poor climate for the development and commercialization of all the technology developed by this massive expenditure of federal R&D dollars.

While RDC and an affiliate, ILDC, have been active in venture lending (basically debt with warrants) directly and through a cooperative agreement among the State of New York, the University at Buffalo Foundation and Insyte Consulting and ILDC, in general venture activities in WNY have been hampered by several things:

1. There is no in place mechanism, such as Jump Start in Cleveland, to facilitate technologies developing out of our universities into commercially viable opportunities. Technologies at too early a stage are hard to develop because it is hard to appreciate the potential and assess risk easily.
2. The dearth of venture capital generally in New York implies that entrepreneurs capable of starting and developing commercialization companies are well advised to leave New York State.
3. Seed and early stage funding remains a problem for companies because the available solutions are local angel networks since the State is absent. The lack of professional funding sources also means of a lack of the experienced professionals who staff such firms.

By way of summarization, in light of the global economic crisis, the difficulties in securing conventional lending, the concomitant increased use of RDC funds and a perennial lack of venture and second stage capital for new business development, among other well known factors, there are significant and an increasing number of challenges with respect to the provision of financial incentives to businesses in Erie County. New York State is among the **most costly states** in which to do business which only compounds the difficulty of our economic development in Western New York and Erie County. The incentives we currently can offer locally (and the diminishing ability of New York State to assist companies located, or which might locate, in the State and Erie County) is bound to exacerbate our level of distress. In particular we have recently identified a significant, pressing and growing need for the following:

- Additional capital and technical assistance for seed and second stage, technology-based companies
- Accelerated levels of conventional, private lending activity
- Additional public lending capacity
- Additional State and federal funding for brownfield and greyfield remediation efforts
- Additional incentives for adaptive reuse projects
- Tiered incentives targeted to growth sectors and to the more distressed parts of our

community

Chapter 3

Planning for Our Future

PLANNING FOR OUR FUTURE

The Comprehensive Economic Development Strategy for Erie County, New York is not intended to be a stand-alone document, nor should it be considered a **new** strategy for guiding economic development efforts within Erie County. Rather, this CEDS for Erie County is an extraction and combining of the primary findings and strategic directives of several recent planning studies and reports undertaken by County and City government, economic development organizations and area institutions. A number of the documents used as building blocks for this CEDS were focused on the geographical and physical development of the community rather than on economic development initiatives alone; nevertheless such plans impact economic development in significant ways. Others of the “building blocks” were more specific to economic development (e.g., target industry studies) but not intended to provide a comprehensive strategy. Therefore, we have built this CEDS on elements from several existing strategies which seemed most appropriate for inclusion in a Comprehensive Economic Development Strategy for Erie County.

Among the primary organizations and plans used as a basis for generating our CEDS are the following:

1. **The Framework for Regional Growth** – a two-county regional vision for Erie and Niagara Counties completed in 2006. The Framework addresses issues beyond merely the area’s economic development challenges and objectives for the future, however, its principles and guidelines for growth and investment form the primary basis and reference point for several other recent, strategic plans that have been incorporated into this CEDS. The Framework

“is a blueprint to support the actions of county and regional agencies relating to the area’s physical development. It will also be used to inform state and local governments, private developers, and non-profit organizations about the process and actions County government could undertake when making decisions affecting the region’s development. The Regional Framework will help the....region make decisions about its growth and development on a coordinated and consistent basis. It will establish a framework for development within the region, and describe policies, programs, and projects that will encourage and facilitate development...consistent with such framework....(it) will help local officials coordinate their decisions so they can anticipate how one decision may affect another.”¹

The Framework analyzed historic growth patterns and investment in the two county area and among its more important findings is that between 1950 and 2000

¹ Framework for Regional Growth mission statement. Framework for Regional Growth. Final Report, October 2006, Chapter 1.

developed areas tripled in size from 123 to 367 square miles while the region lost 137,000 residents. The result of this spread of development, coupled with a declining population base, is a vast network of expensive infrastructure supported by fewer and fewer people. Other results of this pattern of development include shifts in population and households, and disinvestment, abandonment and decline in older urban and rural centers, all of which have a direct effect on livability and the economic vitality of the region. According to the Framework, if these development trends continue unabated over the next 25 years, the cost to taxpayers will be more than \$900 million in new infrastructure.

To deal with this problem the Framework establishes principles to guide jurisdictions to make “better, more coordinated decisions about growth and redevelopment” which principles are “rooted in creating a vital economy, sustainable neighborhoods, strong rural communities, improved access and mobility, efficient systems and services, effective regional stewardship, and conserved natural and cultural assets”.² These principles for strategic growth and investment could result in a savings to area residents of more than \$800 million over a 25 year period.

To advance these principles the Framework divides the region geographically into three general types of areas – “developed, developing and rural” – and, further, into subareas designated as “centers, corridors and conservation overlays”. For each type of area and subarea, the Framework offers development and investment guidance for decision makers. Primarily the study recommends “targets for future development” based on “increased reinvestment in the Developed Area, controlled growth in the Developing Areas, (and) substantially lower rates of land consumption in the Rural Area”.³

The Framework includes a series of general and specific steps to implement Framework recommendations, recognizing, however, the “home rule” context of New York State law in which counties have only limited control over development patterns by virtue of the fact that municipalities below the county level have primary authority to approve or disapprove development proposals and regulate land use through zoning and subdivision. For this reason, the Framework’s guiding principles are primarily designed to help the two counties and regional leaders “make better policy and investment decisions, more effectively leverage limited resources, and provide more consistent direction and useful support to municipalities”. Notwithstanding this County-focused intention, however, several recent area planning documents (as will be noted below) have voluntarily referenced and adopted the principles articulated in the Framework and have attempted to be as consistent as possible with Framework guidelines.

² Summary of the Framework for Regional Growth provided by the Erie County Department of Environment and Planning in an RFP for a Framework for Regional Growth Policy/Procedures Manual

³ The Framework for Regional Growth, Chapter 3: Guiding Growth & Investment

2. **Erie County’s Road to a Bright Future**

Under the leadership of a new Erie County Executive, Chris Collins, the County has set forth a “vision and plan” “focusing on the key areas of economic development”. The vision articulated in the **Road to a Bright Future** is for Erie County to “become a world-class community that benefits its citizens by fostering a place where people want to live and work, businesses want to invest and locate, and tourists want to visit”.⁴ The document presents ten key agenda items that will guide the actions of Erie County government during the Collins administration “to facilitate our community’s growth and prosperity”. These ten action area/goals are the following:

1. *Make our community a global gateway* –the County’s central location in a mega-region stretching from Rochester, New York to Toronto to Ottawa and Montreal provides opportunities to “maximize new economic opportunities such as: advanced manufacturing; alternative energy; freshwater research, education and technology development; healthcare and biosciences; information and communications technology; distribution and logistics; agribusiness; and higher education”
2. *Focus on entrepreneurship, innovation and small business* – capitalize on the Buffalo Niagara Medical Campus and State University of NY research and innovation activities; partner with the Erie County Industrial Development Agency to “expand the export potential of our region’s small businesses” and “expand opportunities for farm-related industries”
3. *Take advantage of our waterfront & greenway* – focus on restoring, enhancing and protecting the waterfront; implement the Greenway Plan, “a guiding document that supports projects that improve access to our waterfronts and connections to the Niagara River [while preserving ecological resources]”
4. *Promote our community’s arts, culture and heritage* – take advantage of our unique and rich historical, arts and cultural institutions.
5. *Make our community a tourist destination* – Erie County will work closely with the Buffalo Niagara Convention and Visitors Bureau to promote the county’s travel and tourism industry
6. *Promote our region’s agricultural industry* – recognizing the vital importance of agriculture (and food processing industry) in the County’s economy, the county will take steps to protect farmland and provide financial incentives to agribusiness
7. *Use our higher education institutions as a gateway* – work to promote our wealth of higher education institutions “to prospective relocating

⁴ Erie County’s Road to a Bright Future, Chris Collins, Erie County Executive

businesses as opportunities for an educated workforce and occupational specialization”

8. *Become the back office capital of America* – capitalize on Erie County’s unique assets for this industry, namely, a productive workforce, low cost of construction, status as one of the top “wired” communities in the U.S., short commuting times, low cost local and national transportation, high quality of life and a stable housing market
9. *Advance high and low tech manufacturing* – build on the county’s supporting infrastructure for manufacturing, including, numerous technical schools, shovel ready sites and low cost construction, a large number of well-established suppliers such as machine shops, plastic molding firms, paint shops, and a large, productive employment base of trained machinists, welders, and other manufacturing trades
10. *Position our area as a medical powerhouse* – the several centers of excellence in various medical specialties, together with a number of leading life sciences research institutions, offer numerous economic development opportunities for the County. The County will support those organizations involved in expanding and supporting this sector such as the Buffalo Niagara Medical Campus

Specific action items associated with the implementation of the key agenda items in the **Road to a Bright Future** are found in Chapter 6, “On Our Way” of this CEDS.

3. Queen City in the 21st Century – Buffalo’s Comprehensive Plan – Buffalo’s Comprehensive Plan, adopted in February 2006, provides the “framework for all other planning initiatives in the City”. It was also created “to be consistent with: the 2030 Long Range Plan of the Greater Buffalo Niagara Regional Transportation Council; the Erie Niagara Framework for Regional Growth...and other plans at the regional scale.”⁵

Buffalo’s Comprehensive Plan has a single goal which is “to transform Buffalo as the urban center of the Buffalo Niagara region through application of smart growth principles, targeted investments, and managed physical change to restore the economic well being, environmental health and sustainability of the city and promote an increase in its population”.⁶ To make this a quantifiable goal, the Comprehensive Plan for Buffalo is re-stated as “reversing the city’s long-term decline in population, employment and the quality of the physical environment”.

The Buffalo Plan is based on four guiding principles from which were then derived seven policies to guide future re-investments, as follows:

⁵ Queen City in the 21st Century – Buffalo’s Comprehensive Plan, page 3

⁶ Queen City in the 21st Century – Buffalo’s Comprehensive Plan, page 5

Guiding Principles for Future Development

- Development should be sustainable “integrating economic, environmental and social concerns”
- Physical development “should follow patterns of smart growth that can help conserve our resources...
- “Fix the basics”
- “Build on our great assets”

Policies for Guiding Investment

- Deliver quality public services
- Maintain public infrastructure
- Transform the economy (to) “transition to a modern mixed economy while working to maintain the base of manufacturing, rationalizing the delivery of economic development services, investing in transportation, redeveloping land for economic expansion, leveraging the special regional role of Downtown, and developing local and regional heritage to attract skilled workers, capital and tourists”⁷
- Reconstruct the schools
- Rebuild the neighborhoods
- Restore Olmsted, Ellicott and the waterfront (i.e., the “unique physical structure of the city”)
- Protect and restore the urban fabric (i.e., the historic architecture of the city)

Implementation measures for the policies articulated in the Buffalo Comprehensive Plan include the following:

- Adoption of a new land use concept and a revised Zoning Ordinance identifying three major corridors for “focused investments in Buffalo’s emerging mixed economy”⁸: A Tonawanda Street Waterfront corridor; a South Buffalo-East Side rail corridor; and a Main Street-Downtown corridor
- Linking the Capital Improvement Program (investment schedule) to the plan’s selected development scenario described in the plan as an

⁷ Ibid, page 7 – underlining is for emphasis on economic development strategy

⁸ The “emerging” economic sectors for the City of Buffalo’s attention, according to the Comprehensive Plan, include: health care and social assistance, including medical research and bio-informatics, manufacturing, education, professional and related services, finance, insurance and real estate, retail, tourism, transportation and warehousing, information technology and other knowledge-based industry, and public administration. These sectors have a “strong base, not only in the region, but in the city itself”. Buffalo Comprehensive Plan, page 12.

“Integrated Regional Center “. This scenario calls for a balance between both large scale economic development initiatives AND revitalization of housing and neighborhoods

- Adding an additional \$35 million per year for 10 years to the funds already available in the Capital Improvement Program for a special “Buffalo Development Program”

City of Buffalo Sub-Area Planning Documents:

3.1 Queen City Hub: Regional Action Plan for Downtown -

This 2003 plan for Downtown recognizes that area’s significance as the economic center of the region having the “largest and most diversified set of economic functions and the largest agglomeration of employment” in both the County and region. It’s relationship to Buffalo’s Comprehensive Plan is as follows:

The Queen City Hub plan is incorporated by reference in the Queen City in the 21st Century: City of Buffalo Comprehensive Plan. As such, it will serve as the basis for the additional work needed to give the Downtown strategy the force of law in zoning ordinances and design review procedures. To be fully effective, it is tied to the City’s capital program and budget. It will also be part of the Generic Environmental Impact Statement (GEIS) review process to be developed for the Buffalo Comprehensive Plan as specified in the State Environmental Quality Review Act (SEQRA). The Queen City Hub plan tells us what to do and where – as well as what not to do – to advance Downtown as a regional center and as the neighborhood of neighborhoods for our city.⁹

Key Investment Areas identified in the Queen City Hub plan:

- The Erie Canal Harbor and Waterfront District
- The Downtown Education and Public Safety Campus
- The Financial District and Government Center
- The Theatre District
- The Buffalo Niagara Medical Campus

According to the Hub plan, strategic investments in these core geographic areas provide the foundation for the vision for downtown’s future. “ All five areas represent employment centers and business development opportunities joined with the potential for residential communities, retail services, and entertainment venues. All five areas are intended to take full

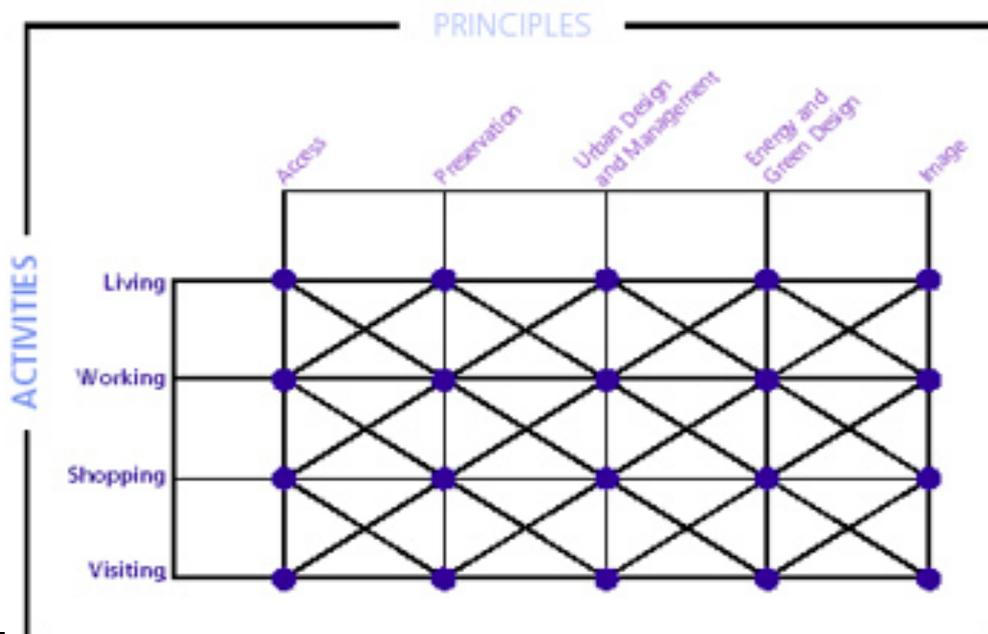
⁹ Queen City Hub: Regional Action Plan for Downtown, Volume II, The Work Plan, Preface

advantage of the decades of significant investment that have already occurred in both the Downtown and inner ring of neighborhoods. It will be essential to further establish the critical mass of development and adjacent employment, residential life, and entertainment venues in and related to these districts.”¹⁰

Among the five priority investment areas for downtown, two have been identified by the plan as most significant. These are the Buffalo Niagara Medical Campus and the Erie Canal Harbor and Waterfront District because the former has been rated as having the highest priority in public forums and surveys over a three year period and the latter is projected to generate “ twice the investment of any other strategic investment area in the next few years”¹¹

Activity Areas and Principles identified in the Queen City Hub plan:

The Action Plan for future investment in and development of Downtown Buffalo is organized around **four activity areas (Living, Working, Visiting and Shopping)**, and five principles. Each activity areas is to be delivered in accordance with the **principles of Access, Energy and the Environment, Urban Design and Management, Preservation, and Image**. Within each of the four activity and five principle areas, action items are further broken down by classification (Policy, Analysis, and Implementation) and time frame (short-, medium- and long-term). The long-term outlook is defined as three to five years, though some aspects of implementation may span 8-10 years (see also Appendix H).



¹⁰ Queen City Hub: Regional Action Plan for Downtown, Volume II, The Work Plan, Priorities

¹¹ Ibid.

Source: Queen City Hub: Regional Action Plan for Downtown, Volume II, The Work Plan

A Word about Downtown As a Place to Live

The Queen City Hub plan for downtown focuses on residential development as one of the keys to creating a more vibrant and healthy center city neighborhood. According to the 2003 plan:

The residential population Downtown is too sparse to activate the needed supporting retail and service venues to make it a great place to live and to keep it alive after the Downtown workforce goes home. In addition to being sparse, the existing housing is not in areas of concentration that give the critical mass needed to establish quality neighborhoods

A study completed in 2004 found a significant market potential for Downtown housing, “both new and through adaptive re-use of existing buildings”. The study identified the types of households that could absorb over 2,000 housing units in in-town neighborhoods annually as: younger singles and childless couples (primary market), affluent empty nesters and retirees and a smaller number of “urban families”.¹²

Indeed, since 2000, there has been a remarkable 50.6% increase in the number of new housing units downtown primarily, though not entirely, as a result of adaptive re-use of existing buildings. According to statistics supplied by Buffalo Place, Inc., in 2000 there were 399 apartment and condominium units in the Central Business District. An additional 409 units were constructed between 2000 and 2009 giving the CBD an approximate residential population in these new and pre-existing units of 1,620. Buffalo Place, Inc. states that:

Downtown is experiencing a renaissance and there is a growing demand for living space. A growing residential base is creating a 24/7 hotbed of activity. Mixed-use residential neighborhoods with a complement of service retail are coming on line. As well, existing surrounding neighborhoods are strengthening the fabric of our Downtown daily. The Downtown geography is expanding and focusing on target areas, creating high quality design and critical mass¹³

¹² Market Analysis: Residential Market Potential – Downtown Buffalo Study Area. Zimmerman/Volk Associates, Inc., December 2004. Executive Summary

¹³ Buffalo Place Inc. is a not-for-profit organization dedicated to improving the economic health and quality of life in Downtown Buffalo.

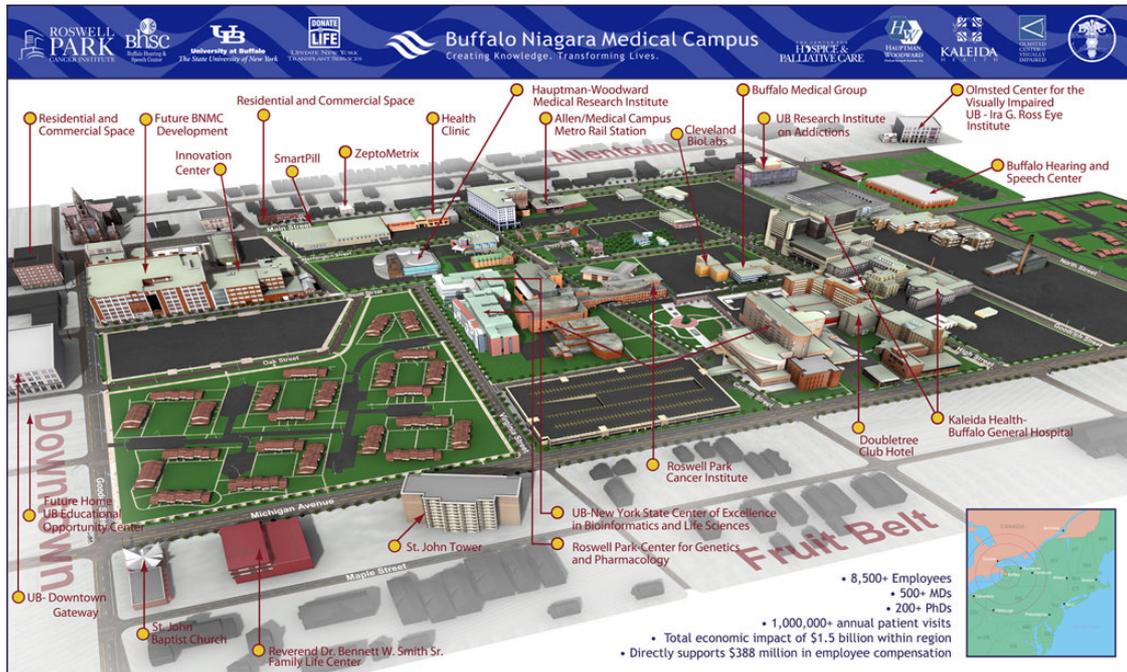
In spite of general economic conditions in the region, this housing trend is continuing; an estimated 140 units are currently under construction and more than 200 additional downtown units have been proposed. A list of Downtown Buffalo Apartment and Condominiums existing and proposed is provided in Appendix I

3.2 Buffalo Niagara Medical Campus - Master Plan

The Buffalo Niagara Medical Campus (BNMC) is a consortium of the region's primary health care, life sciences research, and medical education institutions, all co-located on 120 acres in downtown Buffalo, New York. The members of the consortium and several recent developments on the Medical Campus are described in detail in an earlier section of this Strategy (see Chapter 1, "Starting Point")

In 2001, the BNMC developed a unique partnership in which the University at Buffalo, Roswell Park Cancer Institute, Olmsted Center for the Visually Impaired, Kaleida Health, Hauptman-Woodward Medical Research Institute, Buffalo Medical Group Foundation and Buffalo Hearing & Speech Center began working in collaboration with the surrounding neighborhoods and local government to cultivate a world-class medical campus in downtown Buffalo through development of a Master Plan & Implementation Strategy to provide a framework for future growth at the medical campus. Working with Chan Krieger and Associates (CKA) – a world-renown urban design and architecture firm from Cambridge, Massachusetts – the BNMC presented the Master Plan & Implementation Strategy in November 2002 and the plan was completed in 2003.

The corporation's annual budget is 3.2 million dollars and 39% of the budget comes from a special assessment paid by Downtown property owners, 47% is generated by marketing and special events.



The BNMC is currently undergoing an update to its Master Plan and Implementation Strategy, again with the services of Chan Krieger Sieniewicz . In addition, the BNMC has partnered with the City of Buffalo and the Fruit Belt and Allentown neighborhoods in a planning process called “Four Neighborhoods One Community” designed to “empower community members to speak with one voice about the changes they would like to see in their neighborhoods”.

According to BNMC documents, the Four Neighborhoods One Community effort “*is designed to further integrate Medical Campus-wide planning efforts – as well as those of the individual BNMC institutions – with those occurring in the surrounding community, specifically Allentown, Fruit Belt, and Downtown. The objective is coordinated planning and development that reflects an integrated and complimentary approach to effectively represent four distinct areas as a single community, ultimately resulting in a shared neighborhood benefit to all of the growth happening on the Buffalo Niagara Medical Campus. This will ensure that the resources going into the BNMC do not result in positive impact only within their boundaries but shared by the surrounding community.*”¹⁴

As noted in an earlier section, within the past few years the BNMC has added over 400,000 square feet of research space to its campus with the construction of the Buffalo Life Sciences Complex (BLSC).¹⁵ Moreover, at the north end of the BNMC, sites are being prepared for a Skilled

¹⁴ For more information on BNMC planning efforts see: www.bnmc.org

¹⁵ See Erie County Demographics – Recent Developments Impacting the Economy of Erie County

Nursing Facility, a Global Vascular Institute/Clinical and Translational Research Center, a medical office tower, and a multi-modal transportation center. These will add an additional 1.2 million sq. ft. of research, clinical and support space to the medical campus over the next several years, bringing an additional 3,000 employees and 60,000 additional patients and visitors annually to the BNMC. On the west side of the BNMC, a former manufacturing and office facility at 640 Ellicott Street is being converted to an Innovation Center which will offer the followings:

- Newly renovated class A office suites available from 150 sq.ft. to units as large as 24,000 sq.ft.
- Flexible floor plans customized to individual needs
- Up to 108,000 sq.ft., four-story building with shared conference rooms and support services
- On-site management support
- Lighted and secure parking
- Operational 24/7 building access
- Accessible shipping docks
- Competitive lease rates and terms
- Collaboration opportunities within blocks of Roswell Park Cancer Institute, Buffalo General Hospital, Hauptman-Woodward Medical Research Institute, and other life sciences and health-related companies

3.3 Buffalo Waterfront Planning

It has been mentioned elsewhere in this strategy that the redevelopment of the Buffalo and Erie County waterfront has long been seen as key to the area's economic and cultural future. Both the Buffalo Comprehensive Plan and the plan for Downtown Buffalo designate the waterfront as a major investment area. As also noted in an earlier section, major efforts to develop the waterfront are the responsibility of the Erie Canal Harbor Development Corporation (ECHDC) established in 2005 as a subsidiary of Empire State Development. ECHDC's mission is to "revitalize Buffalo's inner and outer harbor areas and restore economic growth to Western New York, based on the region's legacy of pride, urban significance and natural beauty".

The Inner Harbor



The first phase of waterfront revitalization, completed in 2008, was the redevelopment of the **Erie Canal Harbor** into a new harbor with waterside and landside components. The Erie Canal Harbor was an outgrowth of the Inner Harbor Development Project Master Plan completed in 1999. Elements completed during Phase One included: ¹⁶

- Relocation and rehabilitation of three naval vessels to a new excavated Naval Basin west of their original location
- Relocation of memorials to a new Veterans Park
- Enhancement and expansion of existing esplanade facilities to create a continuous walkway along the water's edge
- Pedestrian connections from the waterfront esplanade to the proposed Phase Two Commercial Slip and to Scott Street.
- Force Main relocation

Phase Two of the Preferred Master Plan was designed to provide basic infrastructure for the full Waterfront Master Plan with a priority of finished projects at the water's edge. Projects included:

¹⁶ The information on the waterfront Master Plan and projects is derived from the Erie Canal Harbor Development Corporation website, www.eriecanalharbor.com

Commercial Slip

- A re-watered navigable Commercial Slip in alignment with the original Commercial Slip.
- A towpath/walkway on the west and east sides of the Commercial Slip.
- Construction of a bowstring truss bridge
- Commercial Street reconstructed and made available for service and emergency access
- Steamboat Hotel and Lloyd Street ruins uncovered and preserved as an archeological site with a combination hard and grass surface
- Site of the former Union Block as an interpreted site with a grassy, sloped lawn.

Historic Streets

- Reconstructed cobblestone street sections rebuilt by the City of Buffalo at historic grade.
- Reconstructed Lloyd, Perry and Hanover Streets for pedestrian and limited access vehicle use only.
- Commercial Street re-built and reopened as a cobblestone street (complete)

Central Wharf

- 40 ft. wide wooden wharf at upper level with steps down to floating steel framed wooden surface dock.
- Hardscape with interpretive elements integrated into the paving.
- Interpretive exhibits.
- Festival site.
- Floating steel framed wooden surfaced docks floating 400 ft. along the Buffalo River.

Buffalo and Erie County Naval and Military Park

- Two buildings with walkway over Commercial Street.
- Buildings sited to have immediate connection and open access to Exhibit Yard.
- Exhibit building in the yard will allow for flexible expanded exhibition space that will open out to Naval Yard.

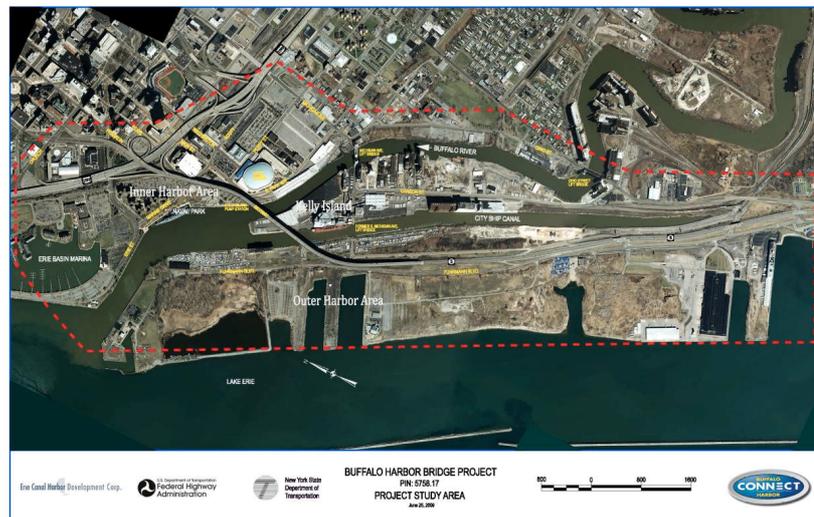
Open Space

- Transitional greenway with pedestrian and service access under skyway.

- Development Parcels defined by historic building footprints and treated as landscaped space.
- Crossroads Plaza north of Naval Yard at Commercial Street.
- Intermodal Transit Plaza at Main and Scott Streets.

Phase Three of the development of the Inner Harbor is known as the “**Canal Side**” project. Its focus is on the redevelopment of 23 acres, located adjacent to the Erie Canal Harbor site, for mixed-use retail, office and housing to “reestablish Buffalo’s historic canal district as the focal point of downtown Buffalo”. The effort includes two substantial construction projects: reclamation, asbestos remediation and demolition of the Buffalo Memorial Auditorium (“Aud”) (now completed) and the reclamation, asbestos remediation and refurbishment of the General Donovan State Office Building situated on the proposed “Canal Side” site. The budget for the Canal Side project is currently slated to include over \$315 million in public and private investments. The project is expected to generate nearly \$240 million in tax receipts alone over the course of 20 years. New York’s Governor recently announced an acceleration of previously committed funding for Buffalo’s waterfront development; the acceleration of funding will have the effect of adding approximately \$50 million to the budget for waterfront projects.

The Outer Harbor



A number of projects are underway or planned to improve Buffalo and Erie County’s Outer Harbor as a waterfront destination. One of the primary difficulties encountered has been connecting the Outer Harbor to the central business district. The difficulties result from the convoluted system of bridges and one-way access roadways constructed over several decades primarily to facilitate increased commercial shipping opportunities which, unfortunately, never materialized due to the

construction of the St. Lawrence Seaway. The Seaway to Canada resulted in the diversion of waterborne traffic away from the Buffalo area. To partly address the problem of access and connectivity, construction of an Outer Harbor Parkway is now underway. This will convert an underutilized industrial roadway into a two-way, tree-lined parkway running parallel to the Outer Harbor. Although the elevated Skyway bridge remains an impediment to direct access from downtown to the Outer Harbor, a proposed at-grade linkage between downtown and the new waterfront parkway is in the planning stages. When completed this at-grade alternative will allow for the eventual removal of the Skyway. As with several Inner Harbor projects, ECHDC, working with the New York State Department of Transportation, will be lead agency for the environmental review and preliminary engineering design process for a proposed new Buffalo Harbor Bridge. Other proposed Outer Harbor projects involve acquisition of significant land parcels for beautification, including planting of lawns and other grassy areas, as well as native vegetation, trees and other aesthetic improvements to the waterfront, and in order to prepare these sites for long-term redevelopment opportunities. Among the sites involved are the 125 acre former Port of Buffalo property and facilities owned by the Niagara Frontier Transportation Authority, a site used for storage of the New York Power Authority ice boom (boom to be relocated) and the seven-acre Cargill, Inc. site. Related Outer Harbor projects to enhance the area as a destination include: a recently completed \$14 million Greenbelt project to create a 6,600 foot recreational path, decorative landscaping and a shallow-water fish habitat along the Lake Erie shoreline and establishing public access to, and improving, the 31 acre Buffalo Coast Guard station and historic lighthouse.

3.3 Brownfield Opportunity Areas

Under New York State's Brownfield Opportunity Areas (BOA) Program, the City of Buffalo in has been provided with three BOA grants to date. The first grant provided significant funding for the completion of a "Nomination" document (completed in the spring of 2009) for 1,900 acres designated as the **South Buffalo Brownfield Opportunity Area** located in the southwestern part of the City of Buffalo, adjacent to downtown, Lake Erie and the Buffalo River. The South Buffalo BOA is characterized as "a mix of active and abandoned industrial sites, railroads, parks, open space, and natural conservation areas, and limited commercial and residential uses"¹⁷ and includes 86 potential brownfield properties. The Nomination Document outlines the extensive research, analysis and public input which provided the basis for a framework to guide the redevelopment

¹⁷ South Buffalo BOA Nomination Document, Appendix A: Land Use Inventory and Analysis

of the area “including the rehabilitation of brownfield, abandoned and/or vacant sites, the enhancement of parkland, the creation of new recreational, employment and mixed-use opportunities and the addition of access improvements.” The Nomination Document also includes a Master Plan (see Appendix J) for future land use and ten guiding development principles:

1. Leverage existing assets
2. Diversify the economic base
3. Enhance and leverage the natural environment
4. Create a strong market brand
5. Prioritize investment in the public realm
6. Promote high quality urban design and place making
7. Foster collaboration and partnerships
8. Provide benefit to the neighboring communities
9. Plan for the long term
10. Establish a range of implementation activities

Prevailing themes in the South Buffalo BOA Master Plan are “sustainability” (i.e., balancing environmental preservation with economic growth)¹⁸, emphasis on employment in growth industries “including green industries, advanced manufacturing and warehousing and distribution” as well as on business parks, business services and R&D, and an integrated network of open spaces with enhancements to improve connectivity across the BOA. Further, the Master Plan “prioritizes good urban design through the proposed development of performance criteria to establish a desirable sense of place” and recommends a broad mix of uses throughout the area. Because the area encompassed by the South Buffalo BOA is quite large and diverse, the plan recognizes nine distinctive “Precinct Areas” each “with a logical collection of land parcels and a driving theme to development.” Implementation of redevelopment initiatives and the sequencing of public sector investment activities have a long-term overall timeframe of 25+ years and build on related improvements on the borders of the BOA which are currently in the pipeline or under construction such as the reconstruction of Fuhrmann Boulevard to provide better access to the shoreline.¹⁹

¹⁸ The South Buffalo BOA has recently been designated a Brownfields Smart Growth Spotlight Community by NY Governor David A. Paterson

¹⁹ South Buffalo Brownfield Opportunity Area Nomination Document - Executive Summary



Precinct Areas in the South Buffalo BOA

In October 2009 the City of Buffalo was awarded \$1.458 million in additional State funding to complete an **Implementation Strategy for the South Buffalo BOA** (which is Step 3 of the NYS Brownfield Opportunity Area program) as well as \$540,000 to complete a Nomination for the **Buffalo Harbor BOA**, an area of approximately 1,040-acres located adjacent to Buffalo Harbor and having within it 50 potential brownfield sites. Similarly, the City will also complete a Nomination study for the **Buffalo River Corridor BOA**, an area of approximately 980 acres characterized with approximately 40 potential brownfield sites located along the north shore of the Buffalo River. The Buffalo River Corridor BOA will be consistent with the **Buffalo River Greenway** initiative which has been hampered by the presence of these brownfield sites along the river.

The Implementation Strategy for the South Buffalo BOA will include: “development of land use implementation techniques including updated zoning regulations and urban design guidelines; creation of targeted and effective development incentives to attract desired land uses; redevelopment feasibility studies and site plan alternatives for specific strategic sites; site marketing to attract developer interest; developing a local management structure to ensure plan implementation of the South Buffalo BOA; and compliance with the New York State Environmental Quality Review requirements”.²⁰

²⁰Source: www.state.ny.us/governor/press/press_1007091.html

The proposed **Buffalo Harbor BOA** will generate a master plan for the largely underutilized land along the Outer Harbor. The proposed initiative would also tie in adjacent areas and planning efforts such as the CanalSide Project and will be managed by the City in partnership with the Erie Canal Harbor Development Corporation. The **Buffalo River Corridor BOA** will delineate the study area boundaries, establish a community participation process, complete a comprehensive land use assessment and analysis of existing conditions, including an economic and market trends analysis to determine a range of future uses and redevelopment projects, identify strategic sites for redevelopment and, based on the analysis, present key findings and recommendations for future uses and actions to revitalize the Corridor.

4. Greater Buffalo Niagara Region Transportation Council - 2030 Long Range Transportation Plan

The Greater Buffalo Niagara Regional Transportation Council (GBNRTC) is the transportation policy and planning organization for the two-county Erie and Niagara region of Western New York. It is the designated Metropolitan Planning Organization (State designated) and shares responsibility with the NYS Department of Transportation for developing transportation plans and programs. The GBNRTC consists of the following member agencies: City of Buffalo, City of Niagara Falls, County of Erie, County of Niagara, New York State Thruway Authority, the Niagara Frontier Transportation Authority and the NYS Department of Transportation. Other “strategic stakeholders on the Council are the Seneca Nation of Indians, the Transportation Council of the Buffalo-Niagara Partnership and the Empire State Development Corporation.

One of the primary responsibilities of the GBNRTC is the development of a long-range transportation plan for the two-county area. According to the GBNRTC, the 2030 Plan is a “multimodal ‘blueprint’ for transportation systems and services aimed at meeting the transportation demands of existing and future development in Erie and Niagara Counties. It serves as a guide to the development of the Transportation Improvement Program (TIP), which consists of all federally funded roadways, transit, and major transportation projects programmed within the region over a five-year period. The long-range plan is developed in partnership with both public and private agencies, community groups, interested residents, and other stakeholders.”²¹ The 2030 Long Range Transportation Plan was adopted in June 22, 2007.

²¹ 2030 Long-Range Transportation Plan for the Erie and Niagara Counties Region. Introduction. Greater Buffalo Niagara Transportation Council. 2007

The 2030 Transportation Plan is prefaced on a “regional vision” which includes the following and which provides a “framework” for developing goals, objectives, projects and programs:

- *Create an economically healthy region*
- *Create an environmental healthy region*
- *Reverse current economic, land use, social and demographic trends*
- *Promote growth in areas with existing infrastructure*
- *Promote equitable regional service for all residents*²²

Among the Plans Goals and Objectives are some that are specific to, or likely to have the greatest impact on, economic development in the two county region. These are the following:

- **Goal:** The Buffalo-Niagara region’s transportation system will improve the region’s economic competitiveness

Objectives:

- Improve the accessibility of the transit-dependent and low-income individuals to employment opportunities
 - Maintain the existing transportation system to support current and future development through the **reuse** of existing facilities and sites
 - Provide transportation services to promote higher density urban redevelopment and infill development projects in, and adjacent to, existing neighborhoods
 - Encourage the concentration of employment and activity sites within transit corridors to maximize transportation efficiency
 - Promote the efficiency and reliability of freight movement (truck and rail) within and through the region; and improve multi-modal facilities and system connectivity to capitalize on growing international and trans-border opportunities
 - Correlate transportation investments to employment growth opportunities
 - Focus transportation system improvements to support and promote tourism
- **Goal:** The Buffalo-Niagara region will plan and develop a transportation system that enhances and protects the region’s natural environmental quality, cultural and historic resources and communities

Objectives:

- Provide transportation services to those areas with existing infrastructure thereby limiting sprawl

²² Ibid. Vision, Goals & Objectives

- **Goal:** The Buffalo-Niagara region will achieve better interjurisdictional coordination of transportation and land use planning

Objectives:

- Promote consistency between transportation improvements and state and local planned growth and economic development patterns
- Coordinate the regional transportation plan with municipal plans. Ensure that all municipalities in the region have an adopted master plan (update) or set of planning tools for monitoring or directing physical and economic development in a regionally consistent manner
- Encourage mixed-use development with multi-modal transportation connections
- Encourage new development to integrate with existing land use and transportation patterns
- Support legislative efforts for ‘smart growth’ and ‘quality communities’ initiatives that promote coordinated planning
- Integrate and strengthen transportation considerations with land use planning by incorporating a land use model within the transportation planning process
- Establish communication and an informational process with municipalities to emphasize the land use-transportation connection²³

Finally, the 2030 Long Range Transportation Plan adopted a companion set of “Policy Guidance Principles” to “guide decision-making by the GBNRTC as elements of the Plan are advanced through the Transportation Improvement Program (TIP) capital programming process....these “Principles” provide the “framework for transportation investment and funding decisions, projects selection criteria, and corridor-level planning”. The relevant policy principles with respect to economic development and this CEDs are the following:

- **Goal:** Preservation of Existing Transportation Infrastructure

Policy Guidance Principles:

- The Plan “allocates approximately 70 percent of total anticipated funds for infrastructure maintenance over the twenty-year plus horizon” of the Plan
- Funding “will be based on the function and condition of facilities – not ownership”

- **Goal:** Improve the Region’s Economic Competitiveness

²³ There are a number of other Goals and Objectives in the 2030 Transportation Plan, but those cited here were found to have the most relevance for economic development and will have the most impact on this Comprehensive Economic Development Strategy for Erie County

Policy Guidance Principles:

- Infill development “will be a priority in economic development transportation project selection” – that is, a higher priority weighting will go to projects that “support improved access to developable brownfield and other vacant sites in the urban core areas, over support for new development initiatives in non-developed greenfield locations. This policy principle is intended to influence and minimize the negative impacts created by urban sprawl. Transportation investments will be utilized to support urban reinvestment and infill development
- Priority development areas in the region “shall be the regional airports and intermodal activity center
- **Goal:** Improve Inter-Jurisdictional Coordination of Transportation and Land-Use Planning

Policy Guidance Principles:

- “Identify and adopt policies to support smart growth and re-investment in existing developed areas with infrastructure in place, and identify disincentives for developing in areas with insufficient infrastructure”. Relative to this guiding principle, the Plan goes on to state that
The land available along many arterials in municipalities in the region can support an amount of development that far exceeds the capacity of these roadways to handle generated traffic. GBNRTC recognizes, through the ‘home rule’ legislation existing in New York State, the rights of municipalities to make land use decisions. Municipal decision makers should be encouraged to consider the impacts and links of local land use decisions on the regional transportation system.
- Transportation improvements to increase roadway capacity and address capacity along roadways and corridors impacted by increased traffic generated by local land use decisions will not be programmed unless municipalities adopt access management and corridor management plans to minimize traffic congestion impacts on roadways.

As acknowledged by the GBNRTC in its Long Range Plan, underlying many of the principles and policies of the 2030 Transportation Plan are the policies and principles expressed in the **Framework for Regional Growth**. The Framework, as has been noted above, provided a deeper understanding of the impacts of previous development patterns on the region’s transportation system as well as on other infrastructure investments. The population distributions and projections included in the Framework were prepared by the GBNRTC and used in determining the designation of Developed, Developing and Rural areas and in developing the strategies in **both** plans to “support a) the conservation and

stabilization of existing neighborhoods; b) new compact, pedestrian-oriented, mixed-use development on vacant and underutilized sites; and c) higher density, employment intensive, mixed use development in Regional Centers and Growth Corridors.²⁴

5. UB 2020 – Comprehensive Physical Plan for the State University of Buffalo



UB 2020 is both a physical plan for the 3 campuses of the State University of New York at Buffalo and an institutional strategic plan. Among the premises of the physical plan is the notion that the UB campuses should be “better connected to each other and the region, more integrated withsurrounding neighborhoods, more environmentally sustainable...Among other things, the plan shows how we can embrace one of the great strategic opportunities of our day – the integration of medical education with clinical practice and health sciences research – in order to build an academic health center that can serve as the cornerstone of Buffalo’s 21st century knowledge-based economy.”²⁵

The physical plan is also predicated on projected growth of the institution and is, therefore, designed to accommodate 1,000 new faculty members, 10,000 more students (bringing the eventual total of students to just under 40,000) and 7 million square feet of new space on three “complete” campuses – North, South and Downtown. Although the University already has a major economic impact

²⁴ 2030 Long-Range Transportation Plan for the Erie and Niagara Counties Region. Impact of Other Plans and Initiatives. Greater Buffalo Niagara Region Transportation Council. 2007

²⁵ Toward a Greater University. Building UB – The Comprehensive Physical Plan for the University of Buffalo. Executive Summary

on our regional economy, that impact is projected to grow exponentially to \$3.6 billion annually in 20 years.

Estimated Economic Impact of the State University of New York at Buffalo

	2006-07	Projected 2023-24
Total economic impact	\$1.7 billion	\$3.6 billion
Academic degrees awarded	6,700	9,483
Students	27,823	39,823
Faculty and staff	8,560	17,879
Research expenditures	\$323 million	\$654 million
Buffalo Niagara jobs generated beyond UB	13,500	19,781
Construction spending	\$55 million	\$180 million
UB-generated income, sales, and property taxes returned to New York State and Erie/Niagara Counties	\$71 million	\$139 million

Source: State University of New York at Buffalo website: http://www.buffalo.edu/community/impact_economic.html

The comprehensive physical plan calls for a continuation of the build-out of the North Campus, reinvestment in the South campus and substantial new investment in the “downtown” campus. The latter campus will address the “rapidly emerging relativities of contemporary medical education and biomedical research” which “demand that our health sciences schools be located in close proximity to the region’s most comprehensive critical care hospital and its nationally ranked cancer research center”²⁶ on the Buffalo Niagara Medical Campus. The physical plan will go hand in hand with the “migration” (relocation) over time of certain academic programs: North Campus will house arts and sciences, engineering and management. South Campus will become the center for inter-professional education – law, education, social work and architecture and planning. The Downtown Campus will accommodate the medical, nursing and public health disciplines and at some future time, dental medicine and pharmacy. The distinct environment and location of the three campuses will, according to the plan, provide “not only a variety of program options, but an array of choices for where to live and study.” However, it also brings with it the need to “make UB whole” by better connecting the three campuses to each other and to the communities in which they are located. Among other strategies to provide this connectivity, the University plan calls for collaboration with city, town, county and region “to align our plans for the future,

²⁶ Ibid.

make the most of infrastructure investments, promote more sustainable patterns of land use, and guide development around our campuses.” The University also plans to work closely with the Niagara Frontier Transportation Authority (NFTA) to improve the current inter-campus transit system (and to support an extension of Metro Rail from South to North Campus)

Building the Downtown Campus

Of particular significance for the region’s economy will be investments to be made in creating a world class academic health center in downtown. It is projected that approximately 4.2 million gross square feet (seven times more than is currently occupied by the University downtown) will be required to accommodate 14,000 students, faculty and staff at the Downtown Campus which will not only house health related programs but also community oriented programs such as the Regional Institute and the Educational Opportunity Center. Facilities to support student life will also be located on the downtown “campus” a campus which, of necessity, will be formed through the acquisition of a series of interconnected, but not necessarily adjacent sites, developed in cooperation with UB’s BNMC partners and surrounding neighborhoods. “Ultimately, changing real estate conditions and other factors will determine the actual build-out of (the) Downtown Campus over a period of many years.” Because the ultimate footprint of the Downtown Campus cannot be determined at this time, the plan establishes “a set of general urban design guidelines”: A few such guidelines are the following:

- Work together with BNMC partners to plan, finance and operate new facilities to minimize duplicationand foster...interdisciplinary encounters
- Refer to the BNMC Master Plan and the Queen City Hub plan as guides for campus development: (e.g., promote mixed used development at Main and Allen and Michigan and High to create neighborhood gateways)
- Utilize the Ellicott Street linear park under development by BNMC as a shared asset with UB’s Downtown Campus

6. Workforce Strategies

The Buffalo and Erie County Workforce Investment Board (WIB) oversees federal Workforce Investment Act funding in Erie County. The Board is responsible for coordinating workforce investment activities with economic development strategies and developing linkages with employers. Two basic types of programs utilize federal workforce investment funding, on-the-job training and customized training (for a specific employer or group of employers) both primarily for unemployed or lower wage individuals. The Buffalo and Erie County Workforce Development Corporation (WDC) was established by the City of Buffalo and County of Erie as a One-Stop Operator to administer federal and

State funds approved by the WIB. The WIB is also a member of the Workforce Training Alliance which is a collaborative effort among funding agencies in Erie County which assist employers to meet their employment and training needs. Other members of the Alliance include the New York State Department of Labor and Empire State Development both offering various forms of training and upgrading of skills assistance to employers and incumbent workers.

In order to meet federal funding requirements, the WIB prepared a Comprehensive Three-Year Local Plan for the period July 1, 2005 – June 30, 2008 and has subsequently filed One-Year Plan Modifications for 2008 and 2009. These were submitted for approval to the New York State Department of Labor and are used as a basis for local area policy and monitoring. The 2008 Local Plan Modification outlines the traditional programs which are coordinated through WIB and indicated some new strategy directions for workforce training efforts in Erie County. The primary traditional programs offered locally, and in collaboration with the NYS Department of Labor and other organizations such as Erie Community College and Erie BOCES among others, are delivered through four full service One Stop Centers for job seekers and employers to access all forms of Workforce Investment Act assistance. In addition to successes in recent years in terms of functionally aligning the workforce assistance programs of the key local and State agencies operating in this arena, WIB's strategy also now calls for the alignment of training programs with the requirements of specific target sectors. This is reflected in the following directions outlined in the WIB 2008 Local Plan Modification document.:

- In its Comprehensive Three-Year Plan submitted in 2005, the WIB conducted surveys to identify industry sectors “that should be targeted for workforce development, based on the priorities of local economic development agencies”: the sectors thus identified were manufacturing, biotechnology, logistics and tourism.
- In 2007, WIB was awarded a grant of \$100,000 to provide skills training and upgrading to workers in the targeted sectors of Manufacturing, Biotechnology and Agribusiness
- The WIB was one of the 10 economic development “partners” in the attempt to develop a Regional Partnership for innovation-based economic development in late 2006. Although the effort failed to secure funding from New York State’s technology agency (NYSTAR), it did lead to agreement among the local partners that the two local sectors based on technology were advanced manufacturing and life sciences. A similar effort led by WIB to secure federal funding for development of a “talent pipeline” for these two target sectors also failed but did result in bringing together the “key education and training agencies with experience in workforce development for manufacturing and biotechnology”.²⁷ The new group, called the

²⁷ Buffalo and Erie County Local Plan Modification, July 1, 2008 – June 30, 2009. Buffalo and Erie County Workforce Investment Board

Workforce Innovation Council, continues to function as a coordinating body for regional sector based workforce development initiatives and is now a multi-county effort

- Other recent workforce training efforts have been targeted to the needs of workers affected by layoffs, particularly manufacturing layoffs (e.g. the closure of American Axle & Manufacturing in Buffalo), and, on the other end of the spectrum, labor shortages being experienced in another target sector, health care

Chapter 4

Targeting our Economic Development Efforts

Targeting Our Economic Development Efforts

In addition to targeting economic development efforts in a sustainable and “smart-growth” manner, consistent with the recommendations of the Framework for Regional Growth, the Buffalo Comprehensive Plan and other recent strategic guides, the various planning documents outlined in previous sections consistently call for targeting our efforts toward those economic sectors that already have a strong base in our community or for which our region offers particular complementary assets. Over the past several years a number of studies have been carried out to identify and characterize these “target clusters and industry sectors”. As a result, we currently have widespread agreement among the County’s economic development entities that our primary target sectors are the following:

- Agriculture/Agribusiness
- Logistics/Distribution
- Back Office/Call Centers/Professional Services
- Advanced Manufacturing (including renewable energy sectors)
- Life Sciences
- Regional/Cultural Tourism

Below we provide background information on the first 5 of these target sectors; strategic goals and activities aimed at enhancing the viability of these sectors in the County are covered in later sections of the document. Regional/Cultural Tourism, however, although important to the area’s overall economy, is not covered in as much depth as the other “targets” because the primary economic development entities in Erie County are not focused on this sector to the same extent as on the other “targets”. Nevertheless, there are several other organizations within the region, both public and private, which have partnered to provide a coordinated approach to capitalizing on regional tourism assets. Among the leading organizations involved are: the Niagara Erie Regional Coalition, the Arts Council of Buffalo and Erie County, Buffalo Niagara Convention & Visitors Bureau, Niagara Tourism & Convention Corporation, Niagara University College of Hospitality & Tourism, the Bi-National Tourism Alliance and the University of Buffalo Arts Management Program, to name but a few of the over 60 nonprofit arts and culture organizations in the Greater Buffalo area. A recent study by the Americans for the Arts, entitled Arts & Economic Prosperity: the Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in Greater Buffalo, NY, found that this “industry” generates \$155.29

million in local economic activity and supports approximately 4,740 full-time equivalent jobs.¹ There are several indications that the area is receiving national recognition as a travel destination, not only because of its proximity to Niagara Falls, but because of its arts and cultural offerings. Recently, Buffalo was named by American Style magazine as the top arts destination among the country's mid-sized cities and the New York Times travel section named Buffalo as one of the 44 places to visit in 2009. Similarly, the National Trust for Historic Preservation has named Buffalo as one of a dozen distinctive destinations and, in fact, selected Buffalo as the host city for the National Preservation Conference in 2011. The National Preservation Conference is the largest gathering of its kind in the United States, annually attracting more than 2,000 attendees to participate in a weeklong series of field sessions, education workshops, and tours that showcase outstanding local examples of architecture, historic preservation and community revitalization. Among the area's most popular historic treasures are the following:

- The country's largest intact parks system designed by Frederick Law Olmsted and Calvert Vaux
- Louis Sullivan's Guaranty Building—one of the first steel-supported, curtain-walled buildings in the world.
- Several buildings by Frank Lloyd Wright, including the Darwin Martin House, George Barton House, William Heath House and the Graycliff Estate. Buffalo has more Frank Lloyd Wright buildings than any city other than Chicago
- The H.H. Richardson Complex, once the State Asylum for the Insane and the largest commission undertaken by the renowned architect
- Eliel and Eero Saarinen's Kleinhans Music Hall
- Buffalo Central Terminal, a massive Art Deco railroad station designed by Alfred T. Fellheimer and Steward Wagner
- The Roycroft Campus in East Aurora

After more than a two year effort, a group of cultural, arts, heritage, tourism, education, government, business and philanthropic organizations produced a cultural tourism strategy for the region in 2005. This blueprint envisions the Buffalo Niagara region as a "world-class tourism destination, in significant measure because of its extraordinary artistic, cultural and heritage attractions which will become better known, more widely admired and more frequently visited"². The Strategy proposes the creation of coordinated programming around "centerpiece" attractions likely to draw national and international attention. The "centerpiece attractions" such as the

¹ Arts & Economic Prosperity: the Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in Greater Buffalo, NY, 2007

Darwin D. Martin House, the Erie Canal, the Albright-Knox Art Gallery and others are to be connected to “experience clusters” that “include venues and events related to the centerpiece as well as other tourism experiences and services (e.g., sporting events, hotels and restaurants)”. In addition to coordinated programming, the strategy calls for targeted marketing, infrastructure improvements such as better coordinated transportation and signage to enhance visitor experiences, and formation of a bilateral structure to deal with (1) marketing and (2) asset development.

² A Cultural Tourism Strategy: Enriching Culture and Building Tourism in Buffalo Niagara, A report from the Buffalo Niagara Cultural Tourism Initiative, January 2005

Industry Sector: Agribusiness

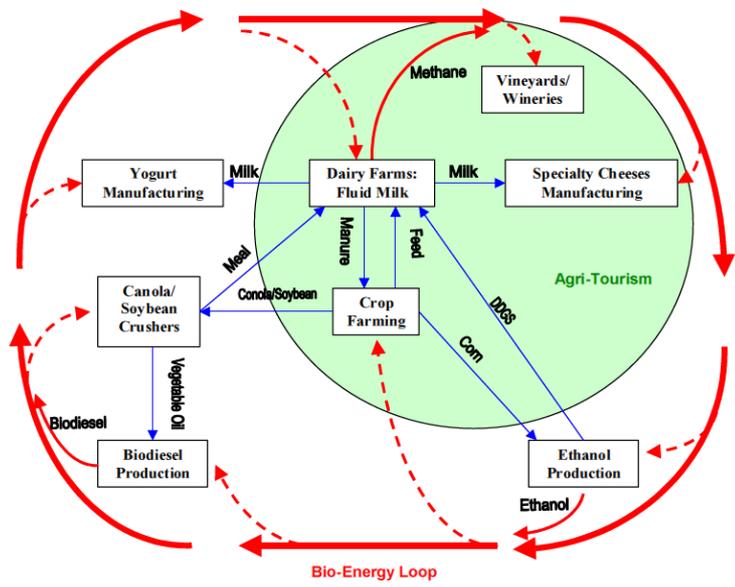
Definition:

- a. businesses involved in the production, processing, and supply of agricultural goods - referring to the range of activities and disciplines encompassed by modern food production;*
- b. businesses who serve all aspects of feeding our community, our nation and the world;*
- c. innovators who are creating new and exciting products through new processes that might be sustainable, entrepreneurial, or unique to name a few;*
- d. innovators who are serving the agri-business industry and helping to advance the region.³*

According to the Buffalo Niagara Enterprise, “our agricultural heritage, logistics capability, and manufacturing bench strength combine to make Buffalo Niagara one of the top food and food processing centers in the nation. Well over a thousand food and food processing companies are located within the region. Agribusiness is the region's largest employer. New York is the third-largest dairy producing state in the U.S., and a lot of those dairy herds are found in Buffalo Niagara. As one of the major dairy farm regions of the US, we're a natural for production of dairy products. Grain-related food producers take advantage of Buffalo Niagara's location. Grain is barged in via the St. Lawrence Seaway from the Midwest and Canadian bread baskets. Western New York State is one of the country's most important wine growing regions. Buffalo Niagara is home to dozens of wineries, and more than a dozen vineyards have opened in the region in the last few years. Capitalizing on its renewable energy history (courtesy of Niagara Falls), Buffalo Niagara is also a center for emerging bio-fuel technology. Coming on line are new plants in Orleans and Erie Counties, which will convert local corn to ethanol.”

³ Definitions for each target sector, shown in grey, were provided by the Buffalo Niagara Partnership and the Buffalo Niagara Enterprise

Interaction of Selected Agricultural Sectors in Western New York*



The Buffalo Niagara Enterprise engaged consultants Informa Economics Inc. and Moran, Stahl & Boyer, LLC to study Agribusiness in the Buffalo-Niagara region. The study, **Agriculture-Dependent Economic Development for Western New York**, was completed in 2006. Its purpose was to assess Western New York’s “agriculture-dependent economic situation and identify opportunities within the region” leading to the development of new and existing agribusiness ventures. A total of ten different potential agricultural “opportunities” were selected for study and ranking into primary and secondary opportunities for WNY.⁴ The “primary” opportunities selected for benchmarking with peer agricultural regions for the purpose of identifying strengths, weaknesses, opportunities and threats, were the following:

- Dairy, Fluid Milk
- Dairy, Specialty Cheese
- Dairy, Yogurt
- Renewable Energy, Biodiesel & Ethanol
- Vineyards, Wineries (Large and Niche)

The principal findings of the study relative to the primary opportunity agribusinesses were the following:

⁴ All ten sectors were considered as a “network of opportunities” and each was viewed as having development potential for the region; primary sectors, however, were those that were recommended for initial BNE focus. The ten sectors studied were: Dairy, Fluid Milk; Dairy, Specialty Cheeses; Dairy, Yogurt; Field Vegetables; Forestry & wood products; Greenhouse vegetables; Maple syrup; Renewable energy: biodiesel; Renewable energy: ethanol; Vineyards: wineries

- Dairy, Fluid Milk: Access to capital is the most critical need for the expansion of existing operations
- Dairy, Specialty Cheeses: Milk supply issues are critical to expansion of existing Specialty Cheese operations
- Dairy, Yogurt: Larger volumes of regional milk also critical to expansion of this sector
- Renewable Energy, Biodiesel & Ethanol: This is the fastest growing sector in agriculture and the study determined that WNY is “ideally situated for the development of renewable energy based products given the geographic nearness to large fuel demand centers”. Though ethanol margins are stronger than biodiesel margins, biodiesel plants are generally smaller and less expensive to develop. The study recommends external recruitment of renewable energy firms in order to grow this industry in WNY.
- Vineyards, Wineries (large and niche) – “The region is favorably suited to develop niche and large-scale winery operations

As for the secondary opportunity businesses, the Study found the following:

- Field Vegetables: Ideal climate, perfect soil types and proximity to east coast markets have facilitated regional growth in this industry. However, the Study notes that the “value-added outlook of the industry is less favorable” and, therefore, “stable capital investment is necessary to maintain...vitality”.
- Forestry & Products: WNY has valuable hardwood resources. Value-added activities of the forestry/furniture sector, which once occurred near the timber reserves, have now been moved off shore to countries such as China with cheap labor. The Study recommends working with the forestry industry “to attract and foster ‘high-end’ artisan furniture manufacturers”.
- Greenhouse Vegetables: The region is well positioned to “recruit national or international operators” in this sector given its “strong knowledge base of horticulture and (its) freight advantage”
- Maple Syrup: The Study predicts that this sector will remain small and fragmented relative to production in Quebec, Canada. However, “if the desire is to grow, then new business structures such as coops and accessible financing programs will be needed”.

Greater detail on these Study findings is provided in the charts below:

Primary Opportunities Overview

Segment	External Recruitment	Marketing Initiatives	Internal Investment
Dairy: Fluid Milk	<ul style="list-style-type: none"> Contact large banks/investors outside of the region to support the expansion of fluid milk production EU or Canadian producers might be willing to relocate/expand operations into Western NY 	<ul style="list-style-type: none"> Explore new models of niche production such as fluid organic milk Promote discussions between producers and processors to stimulate expansion 	<ul style="list-style-type: none"> Expand existing operations/capacity of current producers through lending (e.g., loan programs) to stimulate expansion in the fluid milk market
Dairy: Specialty Cheeses	<ul style="list-style-type: none"> Identify successful specialty cheese producers in WI, MI and CA that could be interested in expanding into Western NY 	<ul style="list-style-type: none"> Support small/niche players/processors via the state's agri-tourism initiatives Build bridges to large and diverse population centers in the east 	<ul style="list-style-type: none"> Support growth in new/emerging processors via existing institutions such as Cornell and local economic development groups Increase/encourage the production of specialty cheeses at the local level
Dairy: Yogurt	<ul style="list-style-type: none"> Look for large processors 	<ul style="list-style-type: none"> Build on strong consumer demand trends and the proximity to large population centers on the East Coast 	<ul style="list-style-type: none"> Support growth in new/emerging processors via existing institutions such as Cornell and local economic development groups Try to build/leverage local opportunities first Support the increase in fluid milk production by local producers
Renewable Energy: Biodiesel	<ul style="list-style-type: none"> Identify potential investors/owners with the capital to develop the biodiesel sector in Western NY Identify specialty chemical companies that are involved in the production of downstream biobased products 	<ul style="list-style-type: none"> Benefits of location to demand centers for biodiesel Enter into dialogues with public transit authorities to include biodiesel in their fleets 	<ul style="list-style-type: none"> Smaller capital investments required for biodiesel operations compared to ethanol Identification of primary feedstocks and potential opportunities/players
Renewable Energy: Ethanol	<ul style="list-style-type: none"> Identify potential investors/owners with the capital to develop the ethanol sector in Western NY, this will likely come from external players 	<ul style="list-style-type: none"> Benefits of location to demand centers for ethanol and access to feedstocks (i.e., corn) via rail and port facilities Benefits of being able to maintain the balance of corn/feedstocks prices and availability relative to DDGS 	<ul style="list-style-type: none"> Larger capital investments will likely focus attention on outside sources of capital investors/investment
Vineyards: Wineries (Large & Niche)	<ul style="list-style-type: none"> Large: Focus on attracting large, wineries (with annual sales above \$10 million) that have demonstrated scale economies Both: The new USDA facility in Geneva can be used to entice/attract new development 	<ul style="list-style-type: none"> Both: Develop a more recognizable brand for Western NY Niche: Assist in more effective Internet marketing Niche: Support agri-tourism opportunities that are linked to NY wineries Both: Address the unfair trade practices of Canada, especially in Ontario Both: Take advantage of proximity to NYC markets 	<ul style="list-style-type: none"> Niche: Vine replacement program Niche: Loan program to build additional and upgrade existing wineries (includes equipment & facilities) Niche: Support the development and expansion of NY niche (with annual sales below \$3 million)

Secondary Opportunities Overview

Segment	External Recruitment	Marketing Initiatives	Internal Investment
Field Vegetables	<ul style="list-style-type: none"> Find new owner for facilities vacated by Birds Eye for processed vegetables Large capital investment required; look to potential processing firms in California 	<ul style="list-style-type: none"> Assistance in marketing to national brokers 	<ul style="list-style-type: none"> Support local vegetable growers with the continuation of the Birds Eye plant Look at other value-added opportunities beyond frozen processing, such as fresh cut products and wet salads
Forestry & Wood Products	<ul style="list-style-type: none"> Attract high-end value-added furniture manufacturing operators 	<ul style="list-style-type: none"> Leverage the large supplies of diverse world-class hardwoods in Western NY 	<ul style="list-style-type: none"> Maintain and support the continued development of hardwood natural resource base (via state forestry initiatives)
Greenhouse Vegetables	<ul style="list-style-type: none"> Look to attract well established large national or international greenhouse operators to the area 	<ul style="list-style-type: none"> Leverage knowledge base of the agricultural and horticultural expertise in the region to develop the greenhouse industry Build on strong consumer demand trends for fresh and organic vegetables Leverage the freight differential to the East Coast between the fresh vegetable growing region on the West Coast 	<ul style="list-style-type: none"> Explore the potential for integrating multiple systems, such as utilizing methane capture from the dairy industry to develop alternative green energy in order to offset the cost of natural gas that is required to heat the greenhouses
Maple Syrup	<ul style="list-style-type: none"> The development focus should remain with local firms rather than trying to attract external investors/participants 	<ul style="list-style-type: none"> Need to develop overall brand and specific niches for Western NY Assist in more effective Internet marketing efforts 	<ul style="list-style-type: none"> Small loan program to start up additional sugaring operations Cooperative development activities

Source: Agriculture-Dependent Economic Development for Western New York, Informa Economics Inc. and Moran, Stahl & Boyer, LLC, October, 2006

In general, it is the “locational advantage of Western New York relative to large population centers versus other competitive (food and agriculture) regions of the county...coupled with a strong commitment to the food and agricultural industry within the region” that recommends agribusiness as a desirable target sector for economic development within the Buffalo Niagara region.

Target Sector – Logistics

Definition:

a. the process of planning, implementing, and controlling the flow and storage of goods, services, and related information from point of origin to point of consumption for the purpose of conforming to customer requirements – to and from Buffalo Niagara to the region, the country, and the world;

b. businesses who engage in the supply chain at any point of entry from concept to final product;

c. innovators who are changing and progressing the face of the industry from Buffalo Niagara's bi-national location;

d. innovators who are serving the logistics industry and helping to advance the region.

The Buffalo Niagara region's location makes it a natural shipping and logistics hub. The region as a whole has eight international ports of entry (4 auto, 3 rail, 1 water), facilitating \$81 billion in annual trade between Canada and the U.S. (which equates to 30 percent of the total trade conducted between the world's two largest trading partners), and, according to the Buffalo Niagara Enterprise, the volume has been growing by approximately 20 percent annually. The region is within one day's travel reach of 55 percent of U.S. population (including nine million consumers in New York City; 65 percent of the Canadian population, including four million consumers in Toronto; and 70 percent of Canadian manufacturing firms.) Within the region there are 5 interstates including the I-90, the longest interstate in the country, which runs between Boston and Seattle.



A recent report, undertaken by Wilbur Smith Associates for the Greater Buffalo-Niagara Regional Transportation Council, concluded that investment in regional freight infrastructure could have a significant economic impact on the Buffalo region. The initial phase of the \$600,000+ study, completed in 2007 found that “public freight investments would create jobs and spur economic development in the forms of new distribution centers, warehousing, and light manufacturing operations...an additional 27,000 jobs (could be created) over the next ten years in the transportation and logistics sector and the wholesale, non-durable goods industry”⁵ if the region emerges as a transportation hub for distributing international goods.” Another recent study of the South Buffalo Brownfield Opportunity Area (BOA), also found that “the amount of bi-national trade occurring near and through Buffalo, access to rail and deep water ports, and the movement away from overburdened ports of entry such as the Port of NY/NJ to ports with greater capacity (such as Halifax) are all key factors that position Buffalo as a future leader in (logistics).”⁶

Technical Memo #1 of the Wilbur Smith study noted that “trucking constitutes the most significant transportation expenditure for all industries,” but also stressed the need to take full advantage of the region’s potential as a rail hub, and growing opportunities in water and air-cargo transportation.

Among the implications of the Freight Study (to date 3 of 5 technical memoranda have been completed and the 4th is in draft form) are the following:

1. **Railroads:** The area has significant potential to become a major **inland port** (or “feeder port”) as part of the Port Inland Distribution Network (PIDN) for the

⁵ Greater Buffalo-Niagara Regional Transportation Council, Newsletter

⁶ South Buffalo Brownfield Opportunity Area Nomination Document. Section 3, Analysis of the Proposed BOA, p. 95.

overcrowded Port of New York and New Jersey. The PIDN concept is “to quickly move ...containers by rail or barge to/from an inland trade cluster to improve throughput, reduce truck costs and trips and improve congestion”. This is the opportunity that led CSX Railroad in 2007 to invest \$8.5 in improvements at its Seneca Yard in Buffalo, Lackawanna and Hamburg to trans-load overseas containers shipped by rail from the Port of New York and New Jersey. The improvements at the Seneca Yard and new equipment at the Port of New York-New Jersey to facilitate direct ship-to-rail unloading have already led to increased use of the Seneca Yard for loading containers from rail-to-truck for further shipping to their ultimate destinations from here rather than from the overly congested Atlantic port. Inter-modal traffic at the Seneca Yard currently amounts to several trainloads per week but the volume of this activity is expected to dramatically increase over the next several years to take advantage of the Seneca Yard’s largely underused annual capacity of 60,000 lifts.⁷ Opportunities have also been identified for an intermodal freight terminal (possibly located at the former Bethlehem Steel site in Lackawanna [see below]) to handle outbound and inbound Canadian rail freight. Among other benefits, this would allow for more efficient shipments from the Port of Halifax which presently are routed through Chicago or trans-loaded from rail to truck to be shipped across the border into Buffalo.

2. Waterborne Cargo:



Port of Buffalo, NY

Although marine cargo does not currently have a large share of the local freight flow in and out of the Buffalo region, waterborne freight is expected to double in volume between 2004 and 2035 largely resulting from the increased shipment of coal, sand and gravel. Technical Memorandum #4 of the Wilbur Smith study notes that marine cargo provides “a low-cost alternative to truck to serve short-haul markets such as the Greater Toronto area” and could also serve in the transport of agricultural

⁷ Niagara Frontier Urban Area Freight Transportation Study, Technical Memorandum #3, Wilbur Smith Associates – projects a 130% increase in rail freight shipments between 2004 and 2035

products, biofuels and energy equipment (growing industries in Western New York). The study offers that domestic agricultural produce may benefit from “China’s missteps in assuring safety of products”. The Port of Buffalo and other regional water ports are currently underutilized and the region has a large pool of labor with experience in maritime cargo handling. The Port of Buffalo can handle a variety of shipments (bulk and non-bulk goods) which gives it an advantage over many other Great Lakes ports without the capacity to handle a diversity of goods.

3. **Trucking/Warehousing and Distribution:** The Wilbur Smith Freight Study identified a strong potential for new growth in Erie County for trucking, warehousing and distribution. In general it was found that the Buffalo-Niagara regional highway system provides for “fluid truck movements and good accessibility to the area’s economic centers”.⁸ The region is one of the lesser congested major metropolitan areas in the county with the exception of the cross-border traffic with Canada which is impeded by bottlenecks at bridge crossings and capacity and congestion problems on southern Ontario highways.⁹ Nevertheless, the study finds a significant opportunity to capitalize on the large volume of “overhead” freight, particularly to and from Canada, that passes through the region. This through-traffic is expected to grow in volume and represents opportunities for additional warehousing and distribution centers as well as for intermodal activity associated with Canadian container traffic. Perhaps an indicator of the anticipated growth in the area’s warehouse and distribution sector is the recent \$13.2 million investment by Sonwil Distribution Center in a new, 300,000 square foot, regional distribution center on a 54-acre site in the Buffalo Lakeside Commerce Park which is served by CSX. A second building on an adjacent site is also planned.
4. **Air Cargo:** The initial report of the Freight Study documented a growing demand for air cargo in the region as a result of a “shift from basic, resource-oriented industries such as basic manufacturing toward a more diverse industry mix including high value-added industries such as microelectronics and aerospace” and a consequent shift from “bulk movements” to “small, higher-value shipments.”¹⁰ Although the study found that the Buffalo Niagara International Airport is well situated in regard to Interstate highways, it does not function as a hub or as an international gateway “despite large volumes of Canadian origin and destination cargo”. 93% of all air cargo out of Buffalo is carried by integrated express carriers such as FedEx and UPS and only 7% of air cargo is shipped on passenger flights (far lower than the national average). This is probably explained by the lack of international destinations and limited non-stop service beyond the east coast and mid-west from Buffalo. Nevertheless, Technical Memorandum #4 of the Wilbur Smith study indicates a number of strengths in the air cargo market in the Buffalo Niagara area, among which are the following:
 - A strategic location in the center of U.S. – Canada trade

⁸ Ibid., Technical Memorandum #1.

⁹ Ibid., Technical Memorandum #4 (Draft)

¹⁰ Ibid., Technical Memorandum #1

- Canadian shippers can clear customs while in custody of their own goods before air shipment because clearance takes place at border crossings
- The region still has a relatively active manufacturing sector including a number of companies producing automotive components and medical devices which are often shipped by air

5. **Logistics Centers: The Niagara Frontier Urban Area Freight Transportation Study** provides an in depth analysis of the logistics sector and its potential for growth in the Buffalo Niagara region. The study looks at the critical factors for success of this industry sector and finds that

by virtue of its location and regional freight transportation system, the Buffalo Niagara region is well positioned to expand its role in international and domestic logistics. The availability of industrial land such as the former Bethlehem Steel plant site and other real estate assets with access to rail, highway and water transportation provides significant logistics development opportunity....a logistics center in the region would include multiple facilities in multiple locations with a container terminal(s) as a transportation service center anchoring the complex. In addition, the Port of Buffalo and one or both airports would also serve as freight centers, providing multimodal transfer capabilities

The study also found that the former Bethlehem Steel plant site in Lackawanna, would be ideal for location of a logistics center given that it is sufficiently large to build warehouses and distribution centers, has good highway access for trucks, and is located where local shippers could be supported and competitive access by rail could be offered. Specifically, Technical Memorandum #4 (draft) of the study recommends development of a “smart port” logistics complex similar to one that operates in Kansas City. An “intelligent logistics complex” in our region could leverage the transportation asset base through use of technology and common marketing; it could have the following features:

- Rail intermodal terminal (truck to rail serving both Western New York and southern Ontario)
- Satellite Marine Terminal – as an inland port for the Port of New York-New Jersey (with customs processing by U.S. or Canadian customs as appropriate for final destination of shipments)
- Multimodal Logistics Park – in addition to rail and highways, the facility could serve marine and air cargo and “offer distribution from a single inventory to customers in both the U.S. and Canada”

Target Sector – Call Center/Back Office/Professional Services

Definition:

- a. firms who drive local industry in roles that advise, market, create technology, implement improved processes, interpret policy, and administer in the ever expanding global marketplace;
- b. businesses who are innovators in their field and deliver skills that provide differentiated products and processes;
- c. innovators who are trying new fields, implementing new technology, and driving local industry into more successful models;
- d. innovators who are serving the professional services industry to help advance the region

In 2007 the Buffalo Niagara Enterprise engaged Moran, Stahl & Boyer, LLC to research back office and call center activity in Western New York. The consultants produced **Western New York State Profile: Resources for Back Office & Customer Contact Centers** which indicated the strong presence of back office operations in Western New York and factors which made the region attractive to back office and call center operations. Among these local assets were the area's labor resources, low operating costs and a strong work ethic. The study further indicated that high rates of unionization within the region's manufacturing sector did not impact contact center/back office operations and perceived issues regarding winter weather had only a minimal impact on productivity. Specific findings of relevance to this sector include the following area characteristics:

- Local back office employers surveyed “gave positive feedback on the available supply of qualified labor” because of the large number of two and four year colleges and the skill levels of high school graduates in the area
- Recruiting for employees is easy due to the large number of former area residents who have moved away but wish to return home to WNY
- High loyalty and low attrition rates among employees
- 20 minute average commute time for the Greater Buffalo area and good air access to the region
- Good access to bilingual language skills among job seekers

- Average wage rates align favorably with industry requirements
- Affordable supply of land, commercial space and housing

It is estimated that the back office sector employs over 16,000 in the Western New York region and that the labor pool can support continued growth in this sector. Companies in the sector that are currently located in Erie County include: Bank of America, HSBC, GEICO, ICT Group, Independent Health, Ingram Micro, M&T Bank, NCO Financial Systems, Univera Health, and HealthNow.

A more recent study, the South Buffalo Brownfield Opportunity Area Nomination Document, notes that the Buffalo-Niagara Falls MSA gained more than 2,000 in collection agencies, more than 3,000 jobs in insurance and related offices and over 2,000 jobs in management of companies between 2001 and 2007. This growth in back office and support sectors was at a rate higher than that of New York State or the U.S. as a whole. The BOA study agreed with the earlier study in stating that the region's competitive advantage in this sector is "due to a relatively affordable but high quality workforce."¹¹

¹¹ South Buffalo Brownfield Opportunity Area Nomination Document. Section 3: Analysis of the Proposed BOA, p. 95

Target Sector – Advanced Manufacturing

Definition:

- a. manufacturing firms who are driving innovation throughout their process, products, and workforce to create differentiated materials, goods, and outcomes;
- b. businesses who are helping to transform the manufacturing process into a high technology industry;
- c. innovators who are working to advance the manufacturing industry on a global stage;
- d. innovators who are serving the advanced manufacturing industry to help advance the region.

Manufacturing of commodity products was a strong and important component of the Buffalo area economy throughout most of the last century. Industries such as steel, automotive parts and chemicals once thrived in the area based on our close proximity to raw materials, hydropower and easy access to markets by rail and water. Steady declines in manufacturing, as noted in earlier sections, have weakened the sector's dominance in the region but, nevertheless, manufacturing remains important to the local economy. However, according to a recent strategic assessment, "to survive, local manufacturers must transition from the production of commodity products that compete on price to differentiated products, processes, and business models that compete on the value to the customer. For this transformation, manufacturers must employ innovative business models and 'lean' processes to produce differentiated products; differentiated products are purchased because of their value, not their low cost."¹² Among the target manufacturing industries for which the Buffalo area has or could have a significant competitive advantage **and** which have the potential to take advantage of innovation and technology are: medical devices, pharmaceuticals, automotive, aerospace and defense, food processing and machinery. The enabling technologies that are likely to "drive innovation that promotes competitive advantage" have been identified as "biotechnology, nanotechnology, information technology and advanced materials".

¹² Buffalo Niagara Technology Business Innovation and Growth Strategy. Western New York Regional Partnership for Advanced Technology and Commercialization. May, 2007

Applications of Enabling Technologies in Selected Industry Clusters

Information & Computing	3D-Printing (Medical Devices, Automotive) RFID-Integrated Manufacturing (Food Processing)
Biotechnology	Advanced Diagnostics (Medical Devices) Designer Drugs (Pharmaceutical Products) Bioplastics (Automotive, Aerospace & Defense)
Nanotechnology	Coatings (Automotive) Retinal Implants (Medical Diagnostics) Displays (Automotive) Fuel Cells (Automotive, Aerospace) High efficiency lighting (Automotive) Monitoring & Sensing Applications (Automotive) Protection Systems (Aerospace & Defense) Carbon Nanotubes (Aerospace) Drug Delivery (Medical Devices, Pharma Products) Advanced Diagnostics (Medical Devices) Machine Tools (Machinery) Milling Machines (Machinery)
Advanced Materials	Light-weight anti-corrosive material (Automotive) Electroactive polymers (Medical Devices) Advanced barrier materials for packaging (Pharma Products, Food Processing)

In recent years a number of companies in Erie County have invested or planned to invest in innovation and technologies which put them into the class of “advanced” manufacturing. Among these are: Buffalo Controls (Buffalo), Sensorcon (Buffalo), Moldtech, Inc. (Lancaster), Astronics Corporation (Lancaster), Multisorb Technologies, Inc. (Cheektowaga), Pfannenbergl (Lancaster), Ashton Potter (Buffalo), Eastman Machine (Buffalo), Beverly Hills Teddy Bear Co. (East Aurora) and API Heat Transfer (Buffalo).¹³

Other technologies that hold promise for Erie County’s economic future are those related to Renewable Energy. A recent study commissioned by the Buffalo Niagara Enterprise and funded by National Grid has shown that the Buffalo Niagara region “stands at the threshold of a major opportunity to apply its industrial capacity within the renewable energy sectors” because of our diverse manufacturing heritage and skilled workforce. The study, entitled Buffalo Niagara: Where Industry Creates Energy, looked at opportunities not only for the generation of renewable energy (wind, solar, hydropower, geothermal, biomass and nuclear), but also at opportunities related to energy transmission and storage, green buildings, transportation and waste remediation/recycling all as related to renewable energy. Among the study’s key findings are the following:

- The region has “a more diverse and balanced industrial base than other competing regions. As a result, the region has a “unique ability to participate in the development, design and manufacture of component parts across all sectors (of the green economy)”. Examples include the manufacture of blades, gearboxes, brakes, generators, and other components required to harness wind energy and photovoltaic cells for solar energy generation. Several of the durable manufacturing sectors present in the region, including plastics and rubber, primary metals, fabricated metal products, machinery, computer and electronic products and electrical equipment among others, are required for renewable energy products
- The region’s location is well suited to receiving goods and services from the Midwest and to serve major population centers in the northeast. Proximity to

¹³ Source: Buffalo Niagara Enterprise – Regional Successes

production sites in the manufacture of component parts for renewable energy facilities is a regional advantage since components and raw materials (most notably with respect to wind, solar and biofuels technologies) can be difficult or costly to transport

- The region is strategically located to “recruit new investment from growing Canadian companies in the renewable energy field”
- The high employment concentration of machinery jobs (6th highest of the 50 largest metro areas) provides an ample skilled workforce for components production
- Availability of engineering school graduates and research on energy coming from the State University of New York at Buffalo and other regional educational and research institutions is another asset in terms of the requirements of the renewable energy industry
- The region has direct energy generation possibilities particularly in terms of wind energy, solar energy (for a micro grid), production of biomass/biofuels and hydrokinetic energy (river currents turning submerged turbines)
- The region has a large number of brownfields which are well suited to renewable energy reuse (for example for wind farms and solar fields)¹⁴

¹⁴ Buffalo Niagara: Where Industry Creates Energy. Executive Briefing. KWR International, Inc.. Produced for the Buffalo Niagara Enterprise (full study and Executive Briefing available at www.buffaloniagara.org)

Target Sector – Life Sciences

Definition:

- a. the businesses and institutions conceiving, creating, producing, and delivering the products and services that support health - whether for animals, humans, food or the environment;
- b. businesses who are delivering and connecting innovation to the health care industry;
- c. innovators who are working to break models, reinvent programs, and drive the agenda for improved global health;
- d. innovators who are serving the life science industry to help advance the region.

Closely linked to, and to a degree overlapping with, Advanced Manufacturing is the Life Sciences sector. The Buffalo region is already home to world-recognized research and diagnostic institutions such as the State University of Buffalo, the New York State Center of Excellence in Bioinformatics and Life Sciences, Roswell Park Cancer Institute and the Hauptmann Woodward Medical Research Institute. The region is also a location for a growing number of companies which supply or produce life sciences products and services including well established companies such as Invitrogen (now Life Technologies), Greatbatch, and Ivoclar. Collectively the companies in the life sciences sector in the Buffalo-Niagara region employ approximately 6,500 people and the sector has grown nationally and locally during the past decade. Development of new facilities at the Buffalo Niagara Medical Campus, significant investments in life sciences activities at the University of Buffalo and education related initiatives focused on developing a workforce capable of supporting innovation-based industries all support an expanded presence of this sector in the area's economy.

Exemplifying recent activities in support of Life Sciences is the success of the University of Buffalo Center of Excellence mentioned above. Since its inception in 2001, the Center has assisted more than 50 companies by “providing research and development support for technology development projects, and subsidizing office and lab space. It has received over \$2 million in grants (in 18 months) to help develop a high tech workforce in the region.”¹⁵ Some tenants in the Center for Excellence are:

- CH3 BioSystems – a biopharmaceutical supplier of molecular tools and services for biomedical researchers. It is also working to identify new potential drug targets and diagnostic kits for researchers in several disease fields. The company received State funding through UB's Center of Advanced Technology

¹⁵“ Boosting bio-tech in Buffalo”. Source: Business First, February 2009 – reprinted on Buffalo Niagara Enterprise website.

- Therex LLC – this company is a spin-off from the University of Buffalo and is developing drugs that can be used to treat or prevent infections on the skin’s surface.
- Blue Highway – is the research/innovation arm of a Syracuse-based medical device manufacturer, Welch Allyn. The company received federal grants to develop new technologies
- Zeptomatrix Corp. – leases lab space in the Center to complement its headquarters two blocks away. The company is involved in molecular biology testing for infectious diseases and manufactures calibrators, among other products.

Another example of a life sciences company that has benefited from its location at the BNMC is SmartPill Corp. which was funded with venture capital in 2003. It has developed the SmartPill GI Monitoring System that uses an ingestible capsule equipped with sensors to monitor a patient’s gastrointestinal health. The device is manufactured at the company’s BNMC facility. SmartPill is one of over 130 companies that have been helped by research stemming from the University of Buffalo and aided in commercialization of inventions by the UB’s Office of Science, Technology Transfer and Economic Outreach. All of the research and development companies located in the Center and BNMC also benefit from the ability to collaborate with one another and with the larger research and clinical institutions located there.

In the area of workforce development, the Center of Excellence has also created a workforce development program to train individuals for employment in the emerging life sciences sector. The program combines workshops, training programs, a web site and an information kit available to workers of all skill levels in Western New York.

Among the companies in this sector that have invested, or have proposed to invest, in recent years are the following: AndroBioSys (Buffalo), Nutricyte, LLC (Buffalo), Cleveland BioLabs (Buffalo), AHRM, Inc. (Buffalo), Polymer Conversions (Orchard Park), APP Pharmaceuticals (Grand Island), and Invitrogen (now Life Technologies) (Grand Island).

According to the South Buffalo BOA study, the rate of employment growth in basic and applied research in the Buffalo Niagara Falls MSA is higher than NYS and the U.S.; from 2001 to 2007, this sector grew by 20% in the two-county MSA. The BOA study points to “life sciences and bioinformatics” as “the most prominent scientific research cluster in the Buffalo region today”.¹⁶ The study goes on to state that the Buffalo area can be an anchor to a broader, super-regional research cluster by linking to research in Syracuse, Rochester and Canada.¹⁷

¹⁶ South Buffalo Brownfield Opportunity Area Nomination Document. Section 3: Analysis of the Proposed BOA, p. 90.

¹⁷ Ibid. p. 92 – 94.

Chapter 5

Directions

Directions

As noted extensively in earlier sections of this Comprehensive Economic Development Strategy for Erie County, New York, we currently have in place a number of “building blocks” that, when taken together, provide a guide for our economic development initiatives over the next several years. Not surprisingly, and despite the fact that the plans and studies referenced in “Planning For the Future” were prepared by and for different levels of government and organizations operating in the economic development arena, these plans and documents, whether comprehensive or more strategically targeted, nevertheless offer us a **remarkably common set of principles. And these common themes are notably different from the area’s economic development strategies of the 1970’s – 1990’s which favored, among other things, investment in expanding infrastructure outward (based on projections of a significant increase in population), incentives for development of campus-like commercial and industrial centers on greenfield sites, segregation of land uses (v. mixed use development), and initiatives to diversify the economy that were largely untargeted to specific industry sectors. In place of these earlier strategies, we are now guided by the following inter-related set of principles:**

- **Principle #1: Sustainability and Smart-Growth**
- **Principle #2: Fix and Maintain Our Existing Infrastructure**
- **Principle #3: Build on Our Assets**
- **Principle #4: Coordinated Planning and Development**

Principle #1: Sustainability and Smart-Growth

Though used frequently in area planning documents, there is no single definition for either of the two interrelated themes of “sustainability” and “smart growth”. Two examples of definitions for “sustainability” that seem appropriate to this CEDS are:

- Economic development which ensures that the use of resources and the environment today does not compromise the needs of future generations
- Pursuing economic growth and social advancement in ways that can be supported for the long term by conserving resources and protecting the environment

A typical definition of “smart growth” is the following which illustrates the relationship between the two concepts:

- “Smart growth” means different things to different people.... its meaning depends on context, perspective and timeframe. The common thread among different views of smart growth is development that revitalizes central cities and older suburbs, supports and enhances public transit, promotes walking and

bicycling, and preserves open spaces and agricultural lands. Smart growth is not no growth; rather, it seeks to revitalize the already-built environment and, to the extent necessary, to foster efficient development at the edges of the region, in the process creating more livable communities....Smart growth meets the key goals of sustainable development through community design¹

Clearly, the **Framework For Regional Growth for Erie and Niagara Counties (FRG)** establishes the need for sustainability and smart growth, and the FRG's principles for strategic growth and investment are **rooted** in these concepts. The FRG defines strategic growth and investment geographically in terms of Developed Areas and Corridors (where investment should increase), Developing Areas (suitable for controlled growth) and Rural Areas (in which there should be lower rates of land consumption). Fostering "Sustainable Neighborhoods" is a key principle of the the Framework and is expressed as follows:

Sustainable Neighborhoods

To serve the increasingly diverse needs of the region's households, Erie and Niagara Counties promote efforts to improve the livability of the region's urban neighborhoods and create more compact, walkable communities in developing areas. Through carefully planned reinvestment, infill development, and new compact development, the region can accommodate anticipated growth on a smaller 'footprint', slow the pace of rural land conversion, ease pressure on the road network, lessen demand for new public infrastructure and facilities, and reduce long-term infrastructure operation and maintenance costs.

Several of the other plans referenced above echo the themes of smart growth and sustainability, including the following:

- **Queen City in the 21st Century – Buffalo's Comprehensive Plan** – sustainability is a guiding principle for future development and is defined in the Plan as "integrating economic, environmental and social concerns". A second principle adopted by this Plan, in recognition of the FRG recommendations, is that physical development should "follow patterns of smart growth that can help conserve our resources". In Buffalo's Comprehensive Plan, sustainability and smart growth are translated into (1) focusing investments in three major corridors: the Tonawanda – Waterfront Corridor; the South Buffalo-East Side Rail Corridor; and the Main Street-Downtown Corridor, and (2) linking capital improvements to a balance between large scale economic development initiatives and revitalization of housing and neighborhoods
- **Queen City Hub: Regional Action Plan for Downtown** - the Plan for Downtown is intrinsically a "smart growth" strategy that targets investment to 5 strategic, downtown areas: Erie Canal and the Waterfront; Education and Public Safety; Financial and Government Center; Theatre District; and the

¹ Definition provided in documents published by the Bay Area Alliance for Sustainable Communities

Buffalo Niagara Medical Campus – with emphasis on mixed use development and the principles of access, energy and environment, urban design, preservation and image

- **Brownfield Development** – the Brownfield Opportunity Area studies completed or proposed for South Buffalo², the Buffalo Harbor, the Tonawanda Corridor, the Tonawandas, and the Buffalo River, as well as the substantial past and proposed investment in projects to remediate and reuse brownfields, in the City of Buffalo and throughout the County of Erie, is reflective of a commitment to the principles of smart growth
- **Greater Buffalo Niagara Region Transportation Council** – 2030 Long Range Transportation Plan - The regional “vision” expressed in the plan encompasses smart growth and sustainability. “Infill development” is a “priority in economic development transportation project selection” according to the 2030 Plan, and the Plan is based, in large measure, on the principles for strategic investment coming out of the FRG. Objectives in the 2030 Plan include: “provide transportation services to promote higher density urban redevelopment and infill development projects in, and adjacent to, existing neighborhoods” and “provide transportation services to those areas with existing infrastructure thereby limiting sprawl”
- **UB 2020** – among the dictates of the Universities three-campus master plan is the notion that these campuses should be better connected to each other and the region, more integrated with surrounding neighborhoods and “more environmentally sustainable” and that mixed-use development should be promoted at gateways to the Downtown Campus.

Principle #2: Fix and Maintain Our Existing Infrastructure

Closely related to, and supportive of, the concept of smart growth are those initiatives and guiding principles found in **most**, if not all, of the area’s major current planning documents that call for fixing and maintaining the “basic infrastructure” we have, although the “infrastructure” in question may differ from plan to plan. In the **Buffalo Comprehensive Plan**, for example, emphasis is placed on “maintaining public infrastructure” and “rebuilding schools and neighborhoods”. **The Long-Range Transportation Plan** calls for 70% of all anticipated funding to be allocated to maintenance of existing (transportation) infrastructure. Both of these are drawn from the **Framework for Regional Growth’s** principles regarding maximizing the use of **existing** infrastructure and utilities.

²As noted in an earlier section, one of the prevailing themes in the South Buffalo BOA Master Plan is sustainability – “balancing environmental preservation with economic growth”

Principle #3: Build on Our Assets and Target Industries

There is **significant agreement** among and between the various documents that form the basis of this CEDS as to the need to build on our assets. There is also substantial agreement that our primary assets are the following:

- Location of Erie County in a mega, international region bordering Canada
- The County’s extensive waterfront and parks system
- Our arts, cultural and historic riches
- A vibrant agricultural sector, primarily in the Southtowns, and a number of food processing plants which, together, provide employment opportunities and supply both local and export markets
- Our relatively low cost, highly productive and well-educated labor supply and the strength and variety of area educational institutions
- Suitability of Erie County for growth in the following target sectors: agribusiness, logistics/distribution, back office/professional services, advanced manufacturing, and life sciences

All of the major planning documents reviewed in previous sections, recognize, at least to some degree, the benefit of building on our assets through strategic targeting of public investments and economic development activities. The relationship between these assets and our shared economic development strategy is, perhaps, most succinctly expressed in **Erie County’s Road to a Bright Future**, but also reverberates through all of the other plans. The chart below provides some detail on the focal points covered by the various planning documents which collectively make up our CEDS as related to area assets:

Assets

PLANS	Bi National Location	Waterfront and Park System	Arts, Cultural and Historic Resources	Labor Supply and Educational Resources	Target Sectors
Erie County’s Road to a Bright Future	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Queen City in the 21 st Century		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Queen City Hub (Downtown)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Buffalo Niagara Medical Campus Master Plan		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Erie Canal Harbor Master Plan		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
South Buffalo BOA		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
GBNRTC 2030	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
UB 2020				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

PLANS	Bi National Location	Waterfront and Park System	Arts, Cultural and Historic Resources	Labor Supply and Educational Resources	Target Sectors
Buffalo and Erie County WIB				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Principle #4: Coordinated Planning and Development

Most of the planning documents referenced in this CEDS **emphasize** the importance, or are, themselves, reflective of, the principle of coordinated planning and development. For example, the need for comprehensive and coordinated planning and development is the **underlying basis** for both the **Framework for Regional Growth** and the **GBNRTC Long-Range Transportation Plan**. The City of Buffalo’s Comprehensive Plan and the action plan for downtown (**Queen City Hub Plan**) both recognize the need for coordination by defining priority investment in terms of specific corridors and functional areas and by addressing the relationship between priority areas and surrounding neighborhoods. **UB 2020** has as a keystone principle better connectivity between the university’s three campuses and between each campus and its surroundings. **The Buffalo Niagara Medical Campus Mater Plan** places great importance on the integration and impact of the BNMC on the adjacent Fruit Belt, Allentown and Downtown neighborhoods as articulated in the BNMC’s “Four Neighborhoods One Community” effort the objective of which is “coordinated planning and development that reflects an integrated and complimentary approach to effectively represent four distinct areas as a single community, ultimately resulting in a shared neighborhood benefit to all of the growth happening on the Buffalo Niagara Medical Campus.”

Translating Principles into Action

In the following sections we will articulate how the collective set of planning documents and the guiding principles that they share in common are being, or will be, translated into action items and initiatives by the key economic development agents in Erie County.

Chapter 6

On Our Way

On Our Way Action Items/Project Priorities

CEDS Implementation

Framework for Regional Growth

The **Framework for Regional Growth (FRG)**, the guiding document for land use and infrastructure development consistent with the principles of smart growth and sustainability, outlined a series of steps to implement the Framework over a 10 year period. Among the short term action items were:

- Develop “Framework-consistent” model ordinances and planning tools for use by local municipalities
- Establish processes to carefully evaluate proposed capital expenditures against Framework principles; in Erie County, form a County Planning Board to work with the County Executive and Budget Office. The Framework also calls for eventual formation of a two-county Regional Planning entity
- Establish a bi-County system for tracking and reporting on development activity. This would include a standardized database record format for development applications
- Develop a list of Type I (under the State Environmental Quality Review Act) actions geared toward projects that should be reviewed in light of Framework principles (e.g., projects occurring in significant environmental areas or major subdivisions in rural areas)
- Change the definition of a subdivision to include 3 to 5 or more lots of any size in unsewered areas which would subject such proposals to additional scrutiny relative to impacts
- Improve County procedures for reviewing local development and subdivision proposals under Section 239-m and n of the General Municipal Law by (1) establishing policies for review that require findings of consistency with the Framework, (2) subjecting additional types of proposals to County review and (3) review existing intermunicipal agreements and adjust these for consistency with the Framework
- Clarify and strengthen reinvestment policies. Examples of actions include additional funding to help revitalize rural business districts; provide funding to help localities encourage more compact, walkable and transit-oriented forms of development targeted at revitalization of traditional and neighborhood centers
- Continue to support and assist local brownfield development initiatives

Longer term (5 to 10 year) implementation steps outlined in the Framework include the following:

- Develop planning area specific (context-sensitive) standards for County roads (e.g., rural roads should be narrower, install bike paths on some roads, sidewalks in more densely populated areas only, etc.). The standards would focus on land use needs in addition to transportation considerations
- Adjust sewer and water district limits consistent with the Framework so as to limit expansions in rural areas and in developing areas with environmentally sensitive areas, to contract sewer districts where there is no actual service in rural areas, and limit water extensions to locations with poor water quality or quantity presents a health issue but only with strict restrictions on tie-ins for new development
- Expand assistance for agricultural conservation (through planning and establishment of a Purchase of Development Rights program among other initiatives)¹

Actions taken since completion of the **Framework for Regional Growth** in 2006 include the following:

- The County Legislature unanimously adopted the Framework for Regional Growth in April, 2007
- As Phase II of the Framework Project, the Counties of Erie and Niagara applied jointly for a State grant which enabled them to engage a consultant to examine the authority and approval and capital budget processes of various County departments and related agencies. The consultant then prepared a procedures manual recommending practices to follow consistent with the principles of the Framework. The procedures manual will also make recommendations for processes that local governments can adopt in order to incorporate the principles of the Framework into comprehensive plans and land use decisions. Among the specific County of Erie departments and related agencies to which the procedures manual is directed are the departments of Public Works, Environment and Planning, and Health and agencies such as the Greater Buffalo Niagara Regional Transportation Council, the Erie County Industrial Development Agency, and the Erie County Water Authority. The procedures manual is nearing completion and, upon its completion, training sessions will be held with affected departments and agencies and then with municipalities
- Another Phase II Framework effort, also nearing completion, involved the engagement of a second consultant to develop a GIS-based application which incorporates the Framework maps as overlays into the County's GIS system. When completed, this will make it possible to identify the Framework designation of any given parcel of land in the property (e.g., whether the parcel is in a developed, developing, or rural area)
- In order to advance to bi-county regional planning considerations, a group of representatives from both counties has been formed and has held its first meeting. This

¹Framework for Regional Growth, Erie and Niagara Counties, New York, Chapter 4, Taking Action, 2006

committee reviewed the Phase II efforts noted above and has begun discussions related to implementing the Framework principles and monitoring development activity

Erie County Economic Development Checklist

As a companion to the **Erie County’s Road to a Bright Future** which articulated the ten key areas of economic development focus for the County, the County Executive, has also put forth an Economic Development Checklist list of specific action items as follows:

Objective	Action Step	Status as of February 2010
Make Our Community a Global Gateway	Brand and market Erie County as an international gateway	Convention and Visitor Bureau (CVB), BNE and Bi-National Tourism Alliance – working on international attraction
	Develop a regional inventory and market strategies for shovel-ready sites	<ul style="list-style-type: none"> • Site data updated and site maps prepared (completion by end of first quarter 2010) • Initial shovel-ready study (see ECIDA Speed to Market) • Grant application to National Grid to support County inventory on statewide online site (online by 2nd quarter 2010)
	Plan intermodal and logistics facilities	<ul style="list-style-type: none"> • Rail relocation design (Beth Steel site) started (completion by 2nd quarter 2010) • Working with Buffalo So. RR for bulk transload facility for renewable energy products • Participate in working group for GBNRTC regional rail study (to be completed by 2nd quarter 2010)
	Install multi-lingual signage at points-of-entry to Western New York	<ul style="list-style-type: none"> • CVB and cultural agencies are in discussion with International Institute for translation services • Work with NFTA for airport and bus station locations 3rd – 4th quarters 2010 (requires funding)

Objective	Action Step	Status as of February 2010
	Promote direct foreign investment in Western New York	<ul style="list-style-type: none"> • On going – presentations to foreign business executives • Explore implementation of a Federal Immigrant Investor visa program as funding source • Develop BNE marketing materials for use by local companies when traveling • Establish formal Foreign Direct Investment Program
Focus on Entrepreneurship, Innovation and Small Business	Advocate for retention and streamlining of economic development programs	<ul style="list-style-type: none"> • ECIDA completed streamlining of application forms, etc. • See ECIDA RDC loan process improvements • See ECIDA – Tiered Incentive program • Develop common, online IDA application for all 6 County IDA’s (complete 2nd quarter 2010)
	Develop the export potential of small business	<ul style="list-style-type: none"> • See ECIDA actions
	Advance opportunities for minority and women-owned business	<ul style="list-style-type: none"> • See ECIDA actions
	Position ECIDA as first call for businesses seeking assistance	<ul style="list-style-type: none"> • See ECIDA actions • First year of outreach calling program – completed (170 companies) • Developed and launched “Your Growth is Our Business” website and marketing brochure • Implement web based data sharing for cross-agency management of business clients – 4th quarter 2010 • Shared Business Development services agreement with Amherst IDA

Objective	Action Step	Status as of February 2010
	Create an integrated workforce development path	<ul style="list-style-type: none"> • Shared services agreement with WIB –program cancelled due to staff changes • WIB participation in “Your Growth is Our Business” outreach meetings – Ongoing • Training Program financial assistance is most sought after “Your Growth” program •
	Establish a “Best Small Business” Recognition Program	<ul style="list-style-type: none"> • Participate (with ECIDA) in SBA Advisory Council and small business recognition awards program
	Support Entrepreneurial Development	<ul style="list-style-type: none"> • Evaluate and organize startup funding for new technology startup companies emerging from UB and medical institutions • See “Jump Start” Initiative below
	Expand small business pollution prevention programs	<ul style="list-style-type: none"> • Presentation made to Area Managers group – Dec. ‘09 • Expand program through creation of EC Sustainable Business Roundtable (2nd quarter 2010) • EC Sustainable Business Roundtable to provide networking for promoting sustainable business practices

Objective	Action Step	Status as of February 2010
Take Advantage of Waterfront and Greenway	Complete Town of Evans and Town of Brant sections of Lakeshore Trail	<ul style="list-style-type: none"> Contract with NYS for federal funding for Wendt Beach to Evans Town Park trail section – bid project Spring 2010
	Complete Union Ship Canal Public Open Space Project in City of Buffalo	<ul style="list-style-type: none"> Design complete, construction start March 2010 – completion 4th quarter 2010
	Complete Phase 2 Improvements to Times Beach Nature Preserve along the City of Buffalo's Outer Harbor	<ul style="list-style-type: none"> Resources allocated to boardwalk repairs and final phase restoration. Eventual development of invasive species management plan and native species plantings to restore bird habitat – Bid 1st – 2nd quarter 2010, complete by end of 2010
	Complete Phase 2 Improvements to Erie County's Tow Path Park in the City of Buffalo	<ul style="list-style-type: none"> Completed
	Complete a feasibility study for Erie County's Ontario Street Boat Launch/Black Rock Canal Park	<ul style="list-style-type: none"> 75% complete. Seeking \$750,000 in outside grants for phase 1 – Approx. bid out in October 2010
	Complete the Niagara River Greenway signage system	<ul style="list-style-type: none"> Award of \$246,000 from EC Standing Committee. Contract for design in progress. Project start – 1st quarter 2010
	Complete improvements to Erie County's Bennett Beach and Wendt Beach Parks in the Town of Evans	<ul style="list-style-type: none"> Submit for Capital Budget 2011 and seek other sources of funding
Promote Our Community's Arts, Culture, and Heritage	Develop a new sector-wide long-term investment vision	<ul style="list-style-type: none"> Work with CVB for strategies to take advantage of County's cultural assets

Objective	Action Step	Status as of February 2010
	Overhaul Erie County's cultural funding process	<ul style="list-style-type: none"> • Evaluate funding for 2011 budget
	Facilitate the completion of the Roycroft Campus Master Plan	<ul style="list-style-type: none"> • Complete by March 2010 <p>Development Components:</p> <ul style="list-style-type: none"> ○ Main Street stonewall – completed Dec. '09 ○ 461 Main demolition and campus parking & greenspace – completed Dec. '09 ○ Cornell Coop. Ext. – ADA elevator – design completed, bid Feb. 2010 ○ Powerhouse design and local approvals – completed Dec. '09 – Bid – 1st qrtr. 2010 ○ Campus drainage – in design ○ Campus roadway and parking lot – in design
Make Our Community a Tourist Destination	<p>Showcase regional rare books collections</p> <p>Implement marketing strategies that promote arts, culture and history to external customers</p>	<ul style="list-style-type: none"> • EC Library investigating opportunities • See ECIDA actions
	Implement marketing strategies that attract more conventions, amateur sports and leisure travel	<ul style="list-style-type: none"> • Established Amateur Sport Commission to market and prepare proposals for hosting amateur sports events

Objective	Action Step	Status as of February 2010
	Aggressively seek to book groups from all marketing sectors at the Buffalo Niagara Convention Center	<ul style="list-style-type: none"> • New CVB director hired and board has been revitalized – new marketing approaches
	Determine the most effective sites in the region for visitor center operations	<ul style="list-style-type: none"> • Ongoing research by CVB to find high traffic/high visibility sites
Promote our Region's Agriculture Industry	Complete a "Farmland Preservation and Economic Development Strategy"	<ul style="list-style-type: none"> • Consultant selected Dec. 2009 • Awaiting grant award NYS • Pursue additional grant from Northeast Sustainable Agriculture Research and Education Program – May 2010
	Advance financial incentive programs for the agriculture industry	<ul style="list-style-type: none"> • Develop micro enterprise loan fund (with ECIDA) for agricultural businesses (first loan Jan. 2010). See also ECIDA actions
	Implement an agribusiness program that focuses on farm-based tourism	<ul style="list-style-type: none"> • Participate on Committee Exploring Southtowns Agri-Tourism trail. Survey and develop retail tourism map for Southtowns – 3rd quarter 2010
Use our Higher Education Institutions as a Gateway	Enhance Erie County Community College and the Workforce Investment Board as training resources	<ul style="list-style-type: none"> • ECC and ECWIB are partners in the “Your Growth is Our Business” outreach program
	Support economic development initiatives of regional institutions	<ul style="list-style-type: none"> • ECIDA restructured ILDC to support local educational facilities’ infrastructure needs. ECIDA closed financing for Buffalo State housing project – Dec. ‘09
Become the Back Office Capital of America	Promote ECIDA's adaptive re-use policy	<ul style="list-style-type: none"> • See ECIDA actions – to date ECIDA has approved 12 adaptive reuse projects totaling over \$120 million in planned redevelopment

Objective	Action Step	Status as of February 2010
	Market regional attributes for locating back office support centers, such as an educated workforce and low building costs	<ul style="list-style-type: none"> • See ECIDA – targeted incentives • Back office success stories are featured in local press
Advance High and Low Tech Manufacturing	Facilitate the development of the Proposed Clarence Industrial Park	<ul style="list-style-type: none"> • Project canceled due to sewer capacity issues and archaeological survey requirements
	Facilitate the development of the North Youngmann Commerce Center	<ul style="list-style-type: none"> • Preliminary engineering completed • EIS completed, Neg. Dec. issued • Funding of \$2 million in 2010 Capital Budget for road and utilities • Funding award from Upstate Blueprint Program (ESD)
	Work with partners to develop a shovel-ready photovoltaic manufacturing site	<ul style="list-style-type: none"> • Riverview Commerce Center identified by BNE as prime photovoltaic site • Riverview Commerce Center enlarged to 177 acres • SEIS approved for expansion • Demolition and remediation of adj. Tank farm brownfield completed by EC and Town of Tonawanda and NYSDEC • MOU between property owner and Chinese technology group • Riverview Commerce Center renamed “Riverview Solar Technology Park” – Jan. 2010

Objective	Action Step	Status as of February 2010
	Prepare shovel-ready sites for firms needing new locations for expanding operations	<ul style="list-style-type: none"> • Spaulding Fibre site remediation: <ul style="list-style-type: none"> ○ NYSDEC Superfund remediation to be completed 1st quarter 2010 ○ Demolition of buildings – completed in 2009 ○ Final demolition of fdns. and environmental remediation – started Jan. 2010 ○ Technical work for parcel rezoning – completed • 5335 River Road site demolition completed in 2009, final site work to be completed in 2010 • Duriron site – Town of Evans-completed Phase 1 and 2 investigation and facilitated purchase by private industry • See ECIDA Speed to Market actions • Facility support for BUDC development sites (Buffalo Lakeside Commerce Park and Riverbend Commerce Park)
	Provide financial incentives through ECIDA programs of available New York State programs	<ul style="list-style-type: none"> • See ECIDA Tiered Incentive Program
	Work with rail and intermodal operators to ensure that transportation availability and costs are competitive	<ul style="list-style-type: none"> • \$300,000 storm damage repairs to County rail line • Secured \$100,000 from NYS Community Capital Assistance Program for rail yard improvements in Village of Hamburg
	Assist in training programs to maintain a state-of-the-art workforce	<ul style="list-style-type: none"> • Now incorporated in other action items
Position our Area as a Medical Powerhouse	Provide ECIDA assistance for back office, technology transfer, and innovation projects	See ECIDA actions

Objective	Action Step	Status as of February 2010
	Support smart collaboration of regional medical facilities ²	See ECIDA actions

Erie County Business Incentives

As described in an earlier section of this there are six industrial development agencies in Erie County: the Amherst IDA, Clarence IDA, Concord IDA, Hamburg IDA, Lancaster IDA and the Erie County Industrial Development Agency (ECIDA). The first five of operate within the jurisdiction of single towns; ECIDA’s jurisdiction is the entire County of Erie (though it usually does not provide incentives within towns having their own IDA’s. Though not the only vehicle for delivering financing incentives in the form of tax abatement to eligible projects, the industrial development agencies, and in particular the Erie County Industrial Development Agency, play a major role in providing such incentives to businesses locating or expanding within the County. The largest of the IDA’s in terms of staffing and number of projects is the Erie County Industrial Development Agency (ECIDA), which, in addition to providing tax incentives, also provides a variety of economic development services to the City of Buffalo and County of Erie including several lending programs described in an earlier chapter, project support for public development projects (primarily infrastructure and brownfield redevelopment of underutilized industrial sites) and a variety of programs to promote exporting by local companies including an export working capital loan program, credit reports and credit insurance offerings, operation of foreign trade zones and participation in international trade shows.

Since 2001 all six of the County’s IDA’s have operated under a uniform Countywide eligibility policy under which the incentives offered are the same for all of the IDA’s. The IDA’s also have established an agreed upon procedure for handling intermunicipal moves and have worked together since 2001 to periodically modify and revise elements of the Uniform Tax Exemption Policy (UTEP). During 2008 and 2009, the IDA Leadership Council discussed and drafted a **major** set of revisions to the UTEP to bring IDA policy into greater consistency with regional goals through a tiered incentives policy by virtue of which incentives for projects are more closely related to project benefits. The new Tiered Incentives Policy was officially aired to a large audience of economic development partners at a forum held on December 2, 2009 and was adopted formally by each of the IDA Boards following the roll-out presentation.

The strategy underlying the proposed modifications is based on the following principles:

- Incentives should be tiered to encourage strategic growth and investment
- Overall length of PILOT³ schedules should be reduced

² Economic Development Checklist. County of Erie

- PILOT schedules should reflect business cycles
- Overall incentive levels should be similar to current levels for eligible projects
- Other economic development partners (e.g., the State, utilities, etc.) should be encouraged to adopt similar incentive principles

The foundations of the Tiered Incentives Policy are (1) incorporation of regional goals, (2) modifications to the UTEP that occurred in 2000 and 2005, (3) three new PILOT schedules and a scoring system to determine the appropriate PILOT for a particular project and (4) incorporation of the concepts of Adaptive Reuse and Enhancement Area Policy into the UTEP:

Under the Tiered Incentives Policy projects will be evaluated based on the degree to which they are

- Consistent with the principles of the **Framework for Regional Growth**
- Consistent with location specific targets (e.g., rural center, development corridors, etc. as defined in the Framework)
- Consistent with cluster industries strategies (the target sectors are Advanced Manufacturing, Back Office, Agriculture/Agribusiness, Life Sciences, Distribution Logistics, and Regional Tourism)
- Planning to utilize GREEN technology (e.g., LEED certified, energy efficient equipment/technology)
- Planning to purchase locally
- Likely to have a high economic benefit in terms of out-of-area sales, employment, wages, flight risk, etc.

Projects applying for tax incentives will be evaluated against specific criteria and scored under weighted categories as shown in Appendix K. Scores will determine whether a project is eligible for a 7 (for projects having a weighted score of 1 – 6 points), a 10 year PILOT (for projects with a score of 6.5 to 12 points) or a 10-Year Enhanced Jobs Plus PILOT (if a project scores 12.5 or higher). The Abatement Schedules under each of these programs and a comparison with Abatement Schedules in use prior to adoption of the new policy are the following:

Year	Existing Schedules		New Schedules		
	10 Year	15 year	7 Year	10 Year	10 Year Enhanced Jobs Plus
1	20	20	10	10	0
2	25	40	10	10	0
3	30	30	20	10	0

³ PILOT – Payments in Lieu of Taxes

Year	Existing Schedules		New Schedules		
	10 Year	15 year	7 Year	10 Year	10 Year Enhanced Jobs Plus
4	35	30	20	20	0
5	40	40	30	20	0
6	45	40	30	20	0
7	50	40	30	30	0
8	55	40	100	30	10
9	60	40		30	20
10	60	50		30	30
11	100	50		100	100
12		50			
13		50			
14		50			
15		50			
16		100			

In addition to adoption of a Tiered Incentive Policy, another significant action taken recently by the industrial development agencies in Erie County was adoption of an Adaptive Reuse and an Enhancement Area Policy. These policies, which can be directly related to the principles of sustainability and smart growth and the **Framework for Regional Growth**, are based on a significant challenge for the area’s economy, namely a large inventory of outdated, functionally obsolete, largely vacant industrial and commercial structures, not only in the urban core, but also in the first ring suburbs and some rural centers as noted in an earlier chapter. This inventory adversely impacts the viability of neighborhoods and surrounding areas by contributing to slum and blight, public safety concerns, environmental concerns, depression of local real estate values and economic viability for infill development. An Adaptive Reuse Strategy allows the industrial development agencies to play a more active role in building and site development in targeted areas and for specific purposes. According to the new Uniform Tax Exemption Policy,

an “Adaptive Reuse Project” involves adapting old structures or sites for new purposes, including potentially a mix of business and commercial uses, and/or market rate housing. An Adaptive Reuse Project is one that will benefit Erie County by redeveloping a blighted site or structure, promoting infill development utilizing existing infrastructure, creating new economic activity at difficult sites and buildings thus helping to eliminate neighborhood slum and blight, promoting re-use of existing buildings and sites, and

*helping to maintain a neighborhood's fabric. Adaptive Reuse Projects are projects that prevent economic deterioration and promote employment opportunities.*⁴

The UTEP also provides for incentives for Neighborhood Enhancement Area Projects. Although IDA's, under State law, are restricted in assisting retail projects and medical facilities, subject to certain statutory exceptions, under this policy and in an effort to revitalize and renovate the numerous neighborhood business districts throughout Erie County, the IDA's will consider such a project for assistance if it is located in or contemplating relocating to areas of the County that are designated, by the respective municipal legislatures, as Neighborhood Enhancement Areas, provided such a project is otherwise consistent with the requirements of State law. In order to qualify for eligibility, the various municipalities within the County must develop a neighborhood redevelopment strategy and designate those areas for which IDA incentives may be made available. According to the new policy, facilities qualifying for IDA Incentives as a Neighborhood Enhancement Area Project will receive a partial abatement from real property taxes equivalent to the abatement permitted under §485-b of the New York State Real Property Law.

Erie County Industrial Development Agency – Three Year Strategic Plan (2009 – 2012)

The plan guiding ECIDA's activities in the coming few years is closely linked to the elements of the County's **Road to a Bright Future**, and to the strategic directions dictated by the other major planning documents discussed earlier. The major Objectives of the ECIDA Three-Year Strategy and Action Steps (by year) are as follows:

- **Make Erie County a Global Gateway** - Expand economic development programs to include tourism and arts and cultural industries and expand ECIDA's cross border and international initiatives
- **Entrepreneurship and Innovation** – Through a consultative sales approach, link small and innovative organizations with various local assistance programs to assist in business growth
- **Targeted Industries and Activities** – Work with other economic development agencies to ensure that tax abatement, loan and international programs of ECIDA are aligned with target industries/activities
- **Marketing and Community Outreach** – Provide on-going education to the public and other stakeholders regarding ECIDA activities and results. Develop educational material and other relevant statistical information to support this initiative. Redesign agency

⁴ Countywide Industrial Development Agency Uniform Tax Exemption Policy, amended as of January 1, 2010.

website to link users to relevant regional economic development information and assistance

- **Speed to Market** – Co-ordinate the identification and redevelopment of obsolete, unmarketable or contaminated properties into shovel-ready sites. Assist businesses in navigating the economic development process as quickly and efficiently as possible.
- **Comprehensive Economic Development Strategy (CEDS)** – Prepare a CEDS to support ECIDA lending and other activities as required by the U.S. Department of Commerce, Economic Development Administration (EDA)

Objective	Action Step	Implementation Year(s) and status
Making the County a Global Gateway	Work with other agencies to develop a role for ECIDA in assisting tourism, arts and culture	1
	Organize regular meetings with cross-border economic development professionals to promote the mega-region	1 First meeting held in Canada on December 7, 2009
	Collaborate with Bi-National Tourism Alliance and similar organizations	1 (Initial discussions have led to co-location of the Bi-National Tourism Alliance organization with ECIDA)
	Develop a financial incentive program for tourism, arts and culture industries	2
	Translate product literature and website pages to various languages	3
	Assist exporters and logistics industry with development of intermodal and logistics facilities and additional FTZ's	Ongoing
	Promote direct foreign investment	Ongoing
	Entrepreneurship and Innovation	Link with WIB and others for joint outreach to small businesses
Additional rounds of loan financing for minority companies and help develop minority owned small business through seminars and outreach		In Progress
Export seminars		Ongoing
Evaluate and establish new Venture Capital program initiatives and assistance for start-up, early stage companies including assistance for commercialization of new products		1 See "Jump Start" Initiative below
Foster Innovation among established clients by linking them to regional resources and		1 In Progress

Objective	Action Step	Implementation Year(s) and status
	financial assistance	
	Maintain close relationship with universities to determine how Agency can assist with commercialization of research	2
	Financial assistance to “old line” manufacturers to foster innovation	2-3
	Host a small business “expo” to link businesses with regional resources	3
Targeted Industries/ Activities	Work with BNP, BNE and other IDA’s and economic development agencies to identify industries to target for ECIDA tax abatement, loan and international programs	1
	Create and implement a Tiered Incentives tax abatement policy	1 Completed
	Assist County in convening a forum of Medical Industry experts to create a Medical/Innovation Incentive Policy	2
	Develop a GREEN tiered financial incentive and marketing program	Included in Tiered Incentives Policy above
	Assess whether ECIDA financial incentives should be targeted to the agricultural industry	2
	Explore incentives for Waterfront and Niagara River shoreline development	2
	Create a Tiered loan/venture capital policy	3
	Focus Business Development outreach efforts on targeted industries and small/minority businesses	Ongoing “Your Growth Our Business” Program
	Continue to coordinate foreign trade missions in targeted industries	Ongoing
Marketing & Community Outreach	With consultants – develop a Marketing Plan for ECIDA	1
	Consider renaming and rebranding ECIDA and affiliated corporations	1
	Work with other IDA’s to develop a marketing campaign on key issues	1
	Website redesign and link website to other regional economic development partners	1 In Progress
	Position ECIDA as a primary resource for businesses seeking assistance	1 In Progress
	Signage at construction sites where ECIDA has provided assistance	1

Objective	Action Step	Implementation Year(s) and status
	Marketing brochure for Adaptive Re-Use policy	1
	Periodic reports on ECIDA activities to Board and potential customers	2
	Develop and promote case studies showing how companies have been assisted by ECIDA	2
	Conduct tours of local economic development projects for Board members and community leaders	2
	Improve exterior building signage	3
Speed To Market	Engage real estate consultant to inventory potential development sites	Completed
	Engage engineering firm to narrow focus of above inventory to most promising 8 sites	1 Firm hired, work in progress
	Complete implementation of process improvements for tax abatement process	1
	Assist Niagara Erie Regional Coalition with efforts to provide electronic “smart” permitting	1
	Hire a Development Project Manager	2
	Work with County or appropriate municipality to advance obstacles to development of the 8 selected properties and complete remediation of development obstacles for 5 of the 8 selected properties (see above)	2-3
	Complete implementation of process improvements for loan process	3
Comprehensive Economic Development Strategy	Organize roundtable with regional economic development organizations	Completed
	Prepare final draft of CEDS and obtain local approval for CEDS	1
	Obtain EDA approval for CEDS	2
	Rewrite RDC loan plan based on CEDS	2
	Coordinate activities to implement CEDS including revising targeted industries/activities and related financial incentive programs	3
	Evaluate and Update CEDS process	3

Objective	Action Step	Implementation Year(s) and status
	Work with economic development agencies in County to specifically identify target industries and activities	3

In addition to the above objectives and related action steps, the ECIDA Three Year Strategic Plan also has, as an objective, the streamlining of its operations through various internal organizational initiatives which would increase Agency efficiency and effectiveness but which are not relevant to, and therefore not included in, this CEDS.

Jump Start Initiative

The Erie County Industrial Development Agency, working in collaboration with the University at Buffalo Center for Advanced Technology and other partner organizations, has recently put forth a proposal to participate in a federally-funded initiative stemming from the Cleveland-based Jumpstart Inc program. As operated in Northeast Ohio, Jumpstart Inc. has three primary functions: to invest in and help companies accelerate their time to venture readiness; to guide high-impact M/WBE’s seeking to raise capital, and; helping entrepreneurs to create strategic and operational plans, access investment funds and move toward milestones. The Jumpstart program, sponsored through funding provided by the U.S. Department of Commerce, Economic Development Administration, was originally centered on Midwest cities but could possibly be expanded to include a region extending from Buffalo to Rochester to Syracuse. If federal and local funding can be secured, the Buffalo-Rochester-Syracuse areas in collaboration with Cleveland’s Jumpstart, Inc. would develop a long term action plan and resources to drive “a coordinated, sustained effort to capitalize on our significant assets in high-tech sectors such as life sciences and advanced manufacturing”.⁵ The end goal of the plan and development of resources would be to accelerate growth of high tech business through, among other actions:

- Resolving high priority challenges such as lack of funding and entrepreneurial talent
- Integrating best practices from comparable cities such as Cleveland (customized for our region)
- Creating a critical mass of technologies, business deal flow, funding, entrepreneurial talent and other vital components by incorporating Buffalo, Rochester and Syracuse into the plan

The proposed initiative, as expanded to our area, would use the proven IdeaCrossing online technology platform from Jumpstart (Cleveland) to connect the regional organizations and

⁵ Excerpt from position paper prepared by Al Culliton, COO, ECIDA

resources into a network that can, in turn, connect business with funding resources with business growth opportunities. A 24 month effort, budgeted to cost \$975,000 (including \$375,000 of in-kind support from participating regional organizations), is being proposed. To date, ECIDA has allocated an initial \$25,000 for the local match to the federal funding that would be requested from EDA (\$400,000).

City of Buffalo Recent Actions

In October 2009, at the direction of the Mayor of Buffalo, a working group of public and private sector individuals was formed to review the City's economic development delivery system, with particular focus on the Buffalo Economic Renaissance Corporation (BERC), the City's primary small business and neighborhood lending corporation. The advisory working group developed a set of recommendations for consideration by the Mayor. The primary recommendation was to place all of the City's economic development programs under the Office of Strategic Planning (OSP) with the Executive Director of OSP to serve as chief economic development officer of the City, effectively re-organizing and utilizing previously independent agencies "consciously and collectively as 'tool providers' to deliver the City's economic development objectives"⁶ Among other actions, the Mayor has announced that, as a result of the proposed restructuring, BERC community development activities will be transferred to the Buffalo Urban Renewal Agency whose "new mission will be to support neighborhood economic development that builds around ...commercial cores, with a concentrated effort of housing revitalization, demolitions, infrastructure improvements and providing loans and grants to businesses to create strong neighborhoods". In addition to several re-structuring recommendations designed to establish a more effectively integrated delivery system, the working group recommended that OSP and its programs be aligned to achieve the following primary economic development objectives:

- Successful neighborhoods – the City should focus on neighborhood development (including streetscapes business development, façade, vacant land, housing, etc.) using BURA and Community Development Block Grant funds. However, it is also recommended that neighborhood development projects should be connected to large-scale economic development project such as school reconstruction, Larkin District investments, etc.
- Collaboration with regional economic development entities
- Reduction of administrative costs and processing delays
- Changes as necessary to build a sufficient and well qualified economic development and planning staff

⁶ Announcement by Andrew Rudnick, President and CEO of the Buffalo Niagara Partnership, February 24, 2010

- Creation of effective partnerships among local community based organizations, City Hall and local foundations. Partnerships should be empowered to act outside of government processes, have multi-year commitments and clear, measurable and accountable goals
- A pro-active approach and customer-friendly culture within City Hall⁷

2010 Regional Agenda

Annually, the Buffalo Niagara Partnership engages the cities of Buffalo and Niagara Falls and the counties of Erie and Niagara in a collaborative effort to establish an “agenda” of top priority public policy and action items for the coming year. The agenda, to a large extent, serves as a collective message from our region to State and federal policy makers to make legislative and regulatory decisions beneficial to the region’s development objectives. In the table below, the top priority policies and actions for 2010 are summarized (with specific action items noted as related only to Erie County):

Priority Initiatives	Specific Action/Policy	Actions/Policy Decision By
UB 2020 ⁸	State policies to implement the University of Buffalo’s comprehensive plan	SUNY Board of Trustees, NYS Legislature
Target Industry Sectors		
<ul style="list-style-type: none"> • Life Sciences 	Buffalo Niagara Medical Campus/Academic Health Center development	State funding for acquisition, construction and development <ul style="list-style-type: none"> • \$25MM – toward a multi-modal transportation structure for the Global Vascular Institute • \$10MM - recruitment of scientists • \$25MM – land acq. for UB downtown campus • \$20MM – site preparation, acq., infrastructure • \$20MM –

⁷ Summary recommendations of the working group provided by the Buffalo Niagara Partnership

⁸ See Chapter 3 of this CEDS

Priority Initiatives	Specific Action/Policy	Actions/Policy Decision By
		neighborhood development
		Workforce development <ul style="list-style-type: none"> \$2MM – job training, etc.
<ul style="list-style-type: none"> Tourism 	Buffalo State College/Art District	State funding for: <ul style="list-style-type: none"> \$40MM – stadium \$5MM – parking ramp
	Darwin Martin House	State funding for final phase restoration (\$10MM)
<ul style="list-style-type: none"> Advanced Manufacturing/Life Sciences 	Small Business Innovation Research Program	Federal reauthorization of SBIR for 14 year period
<ul style="list-style-type: none"> Agribusiness 	Rural broadband access	Federal funding
Transportation System and Logistics	Reauthorize federal funding	Reauthorize SAFETEA-LU
	Peace Bridge Expansion Project	Record of decision by Federal Highway Admin and lease agreement with GSA for new Customs plaza
	High Speed Rail	American Recovery and Reinvestment Act funding for “Empire Corridor” high speed
	Southtowns Connector	\$10MM federal/State funding for bridge connecting downtown Buffalo to outer harbor
Land Development	Spaulding Fibre Site	\$2MM federal funding for infrastructure
	Buffalo/Lackawanna Waterfront Corridor	\$8 MM federal monies to relocate sewer station to support redevelopment of Buffalo Lakeside Commerce Park, Bethlehem Steel site and Outer Harbor properties
	Buffalo/Lackawanna Sewer System Consolidation and Pump Station	\$1MM federal funds to upgrade Erie County Pump Station for service to BLCF
	Buffalo Revitalization Initiative	\$15MM federal for property acquisition, remediation, development \$15MM federal for business district revitalization

Priority Initiatives	Specific Action/Policy	Actions/Policy Decision By
	Brownfield Cleanup	EPA (federal) funds to support Brownfield Opportunity Areas
	Bethlehem Steel Site	State funding for \$2MM rail relocation
	Shovel-ready Sites Initiative	\$4MM State funding for roadway network Riverview Commerce Park/North Youngmann Commerce Center
		\$2MM State money for regional land acquisition fund
		\$5MM State money for regional demolition fund
	Riverbend Commerce Park	\$3MM State for infrastructure
Energy Policy	Several energy related policy recommendations to reduce energy costs	State legislation and NYPA
Statewide Economic Development Policy	Empire Zone Replacement Program	Recommends establishment of a NYS program to replace the Empire Zone Program – including adoption of a “tiered incentives” program
Great Lakes Economic Revitalization	Great Lakes Business Agenda	Federal support for policy priorities for transforming the Great Lakes region (recognizing cross-border opportunities)
	Great Lakes Restoration	Fair share of funding for repair of coastal waters to the Buffalo-Niagara region

High Priority Projects – City and County

The following chart summarizes several high priority development projects for the City of Buffalo and County of Erie.

ERIE COUNTY AND CITY OF BUFFALO HIGH PRIORITY DEVELOPMENT PROJECTS

Project Description	Total Cost	Amount Required	% Design	Construction Duration	Green?
ECONOMIC DEVELOPMENT PROJECTS					
1. Spaulding Fibre: Completion of demolition and remediation, construction of access road; constriction of common storm water systems in non-developable buffer areas construction of individual sites, avoiding construction of individual retention systems.	\$8,000,000.00	\$3,000,000.00	100%	24 months	Yes
2. Riverview Commerce Center Industrial Park: Construction of industrial park roadway.	\$4,000,000.00	\$3,000,000.00	20%	12 months	Yes
3. River Road Tank Farm remediation: Testing and remediation of defunct petroleum tank farm, allowing development as industrial park.	\$1,500,000.00	\$1,450,000.00	30%	12 months	Yes
4. Roycroft Campus Powerhouse: Reconstruction of historic Powerhouse to serve as a new Visitor Center.	\$4,000,000.00	\$2,000,000.00	95%	18 months	Yes
5. North Youngmann Commerce Center Industrial Park: Develop common stormwater drainage and retention system for the entire 90 acre town-owned industrial park site, avoiding construction of individual retention systems.	\$6,000,000.00	\$4,000,000.00	50%	18 months	Yes
6. Tri-County Industrial Park: Infrastructure improvements.	\$10,000,000.00	\$5,000,000.00	40%	18 months	Yes
7. Angola Airport Industrial Park: Infrastructure improvements.	\$3,000,000.00	\$3,000,000.00	30%	12 months	Yes
8. Bethlehem Steel Rail Relocation/Port Development: Relocation of railroad tracks to allow for redevelopment.	\$5,000,000.00	\$3,000,000.00	35%	18 months	Yes
9. Bethlehem Steel Industrial Park - Phase 1: Infrastructure improvements.	\$7,000,000.00	\$7,000,000.00	10%	15 months	Yes

ERIE COUNTY AND CITY OF BUFFALO HIGH PRIORITY DEVELOPMENT PROJECTS

Project Description	Total Cost	Amount Required	% Design	Construction Duration	Green?
10. Elk Street Corridor Redevelopment - Phase 1: Infrastructure improvements.	\$10,000,000.00	\$10,000,000.00	15%	18 months	Yes
11. RiverWright/Buffalo River: Infrastructure improvements.	\$4,000,000.00	\$4,000,000.00	10%	18 months	Yes
12. Clarence Industrial Park: Develop roadway and install sewer improvements.	\$5,000,000.00	\$3,000,000.00	40%	18 months	Yes
13. Colvin Estates Industrial Park: Infrastructure improvements.	\$3,000,000.00	\$3,000,000.00	20%	12 months	Yes
14. Riverbend Smart Growth Business Park - environmental and site prep., infrastructure for 200 acre transformation of former steel plant as part of Buffalo's "Green Belt" sustainability and technology strategy	\$30,000,000.00	\$30,000,000.00		9 months	Yes
15. Darwin-Martin House Renovation: Frank Lloyd Wright National Landmark historic site	\$7,500,000.00	\$7,000,000.00		24 months	Yes
16. Multi-modal Biomass Storage Infrastructure (rail, road, riparian interface improvements)	\$14,600,000.00	\$1,500,000.00		36 months	Yes

Performance Measures

On an annual basis, the Erie County Industrial Development Agency, as the Planning Organization responsible for preparation of this CEDS document, will survey the key economic development organizations and will compile information on the status of the projects and action items outlined in the 2010 CEDS. Performance measures will be applied to evaluate the extent to which the CEDS action items are being successfully developed and implemented. The types of measures to be applied will depend on the nature of the project or action and will include the following (as appropriate):

- Number of jobs created or retained (e.g., for financial assistance programs)

- Number and types of public and private sector investments undertaken in the region (e.g., new start-up businesses, absorption of land in industrial parks and industrial/commercial expansions or new builds, completion of infrastructure projects)
- Changes in the economic environment of the region (e.g., periodic updates on measures of economic well-being such as unemployment rates, population growth or decline, foreclosure rates, etc. based on information available at the time of measurement)

Chapter 7

Public Participation in Development of Strategic Plans

PUBLIC PARTICIPATION IN DEVELOPMENT OF STRATEGIC PLANS

As emphasized in Chapter 3 – Planning for Our Future, the Comprehensive Economic Development Strategy for Erie County, New York is not a **new** or stand alone strategy for guiding economic development efforts within Erie County. “Rather, this CEDS for Erie County **is an extraction and combining** of the primary findings and strategic directives of several recent planning studies and reports undertaken by County and City government, economic development organizations and area institutions”. **All of the planning documents that form the basis of this CEDS have had extensive public involvement and review during their preparation** as outlined below:

1. **Framework for Regional Growth** – Attachment A to this section shows just some of the many public participation opportunities that were an integral part of the process of developing the **Framework for Regional Growth**. In addition to a special website for the FRG, there were numerous public meetings, electronic publication of all documents and meeting minutes, and a survey for public input.
2. **The Queen City in the 21st Century: the Buffalo Comprehensive Plan**
The plan was formally adopted by the City through vote of the Common Council and was subject to a Generic Environmental Impact Statement (GEIS), as specified in the State Environmental Quality Review Act (SEQRA). In addition, the City’s zoning will be updated to be consistent with the plan. Local plans already completed were incorporated the Comprehensive Plan including the following: The Queen City Hub: Regional Action Plan for Downtown, Commercial Area Revitalization Effort (CARE) Program revitalization plans by the Buffalo Economic Renaissance Corporation, the Local Waterfront Revitalization Program, the Buffalo Niagara Medical Campus Master Plan, plans created through the Good Neighbors Planning Alliance and others. Moreover, according to the Comprehensive Plan, the Plan was “created to align with other planning efforts at the regional scale” such as the 2030 Long Range Plan of the Greater Buffalo Niagara Regional Transportation Council, the Erie Niagara Framework for Regional Growth, the Buffalo Niagara Cultural Tourism Initiative, and other plans at the regional scale. “The plan was created by the Office of Strategic Planning with the active involvement of all City departments and agencies and in consultation with officials of Erie County and other public bodies. It is based on extensive consultations with the public, including citizens who participated in the

Neighborhood and Downtown Summit series, those working through the City of Buffalo's Good Neighbors Planning Alliance, and many others ".¹

3. **The Queen City Hub: A Regional Action Plan for Downtown Buffalo** - according to the Queen City Hub plan preface, the Plan

is the product of continuing concerted civic effort on the part of Buffalonians to improve the center of their city. The effort was led by the Office of Strategic Planning in the City of Buffalo, the planning staff at Buffalo Place Inc., and faculty and staff of the Urban Design Project in the School of Architecture and Planning at the University at Buffalo. The plan has drawn upon the considerable technical expertise of eighteen public and private sector partners and incorporates the analysis of more than fifty technical studies and plans they and others produced over the past decade. the priorities expressed in the plan have been developed and reviewed in full public view. Televised public summits, multiple Downtown Buffalo 2002! newsletters, a web site (www.downtownbuffalo2002.org), frequent press reports, stakeholder focus groups, two cycles of survey research on priorities (1999-2002), over fifty public presentations, and detailed professional reviews were some of what was employed to shape the vision and implementation program and keep everyone informed about its evolution.²

4. **Buffalo Niagara Medical Campus – Master Plan**

In addition to the extensive public involvement in the development of the BNMC Master plan in 2001-2002, public vetting and input continues to be a part of BNMC's planning process as evidenced by the following excerpts from the Buffalo Niagara Medical Campus website:

The BNMC hosted informational open houses in September of 2008 and again in April of 2009 to talk about the developments with residents and business owners from the surrounding neighborhoods. The City Planning Board also convened a public hearing regarding the development projects on November 6, 2008 at the Buffalo and Erie County Public Library. Download related documents: [Final Generic Environmental Impact Statement and Figures \(PDF\)](#) and [Figures \(PDF\)](#). Led by BNMC staff, a team from Kaleida Health, the University at Buffalo, Cannon Design, and Ciminelli Development meet weekly to ensure the projects are coordinated

¹ This information and quotes taken from The Queen City in the 21st Century: the Buffalo Comprehensive Plan, "About this Plan" section, on the City of Buffalo website:
http://www.ci.buffalo.ny.us/files/1_2_1/Mayor/COB_Comprehensive_Plan/chapter_91.html

² The Queen City Hub: A Regional Action Plan for Downtown Buffalo, Preface. See
http://www.ci.buffalo.ny.us/files/1_2_1/hub/volume%20i/overview.htm

The Buffalo Niagara Medical Campus, in partnership with the City of Buffalo and the Fruit Belt and Allentown neighborhoods, embarked on a planning process called Four Neighborhoods, One Community designed to empower community members to speak with one voice about the changes they would like to see in their neighborhoods.

Four Neighborhoods, One Community is designed to position Buffalo as a national model for how the BNMC as an urban campus and economic development engine can effectively develop and grow in conjunction with surrounding neighborhoods for the benefit of the greater community.

The BNMC and the City hosted four community forums in 2008 in both Allentown and the Fruit Belt. More than 100 residents, business owners, and community members gathered to discuss the changes they would like to see in their neighborhoods.³

5. Erie Canal Harbor Master Planning

In connection with the Erie Canal Harbor Master Plan there was extensive public outreach and involvement during the sketch planning process, a Public Scoping Meeting following preparation of the Draft Generic Environmental Impact Statement, opportunities for review of documents by the public at large throughout the planning process, a public hearing (October 2009) with a nearly month-long public comment period following the hearing, and additional meetings with particular stakeholders (See Attachment B)

6. Brownfield Opportunity Area

According to the **South Buffalo Brownfield Opportunity Area Nomination Document Executive Summary – Draft**, public and stakeholder participation was a major “component of the BOA Nomination process. Each element of the comprehensive engagement process - stakeholder interviews, public open houses, and steering committee meetings - contributed directly to the BOA analysis and evolution of the Master Plan. Public outreach at each stage was synthesized into ten Principles, which in turn, directed the development of the Master Plan”.

The community participation plan was made up of two types of events: public open houses and steering committee meetings.

- **Public Open Houses**

Five Public Open Houses were held throughout the planning process to solicit input from the audiences identified above. Each Public Open House was structured to reflect the stage of the planning process at which it was held. The first entailed the introduction of the project to the community and the second was comprised of a visioning workshop.

³ Buffalo Niagara Medical Campus website is <http://www.bnmc.org>

These resulted in the development of a series of Principles representing the community vision for the BOA and allowed the consultant team to produce a range of land use development options, which reflected these Principles. The initial options work was described and evaluated at a third public open house. The Principles and analysis of options formed the basis for the development of the draft master Plan, which was presented to the public at a fourth open house for review and commentary. Feedback from the fourth open house was incorporated into the final Master Plan, presented to the public at a fifth and final open house. In addition to presenting these materials, the final open house acted as a formal conclusion of the BOA study and provided an overview of the next steps in the BOA process.

Steering Committee Meetings

Nine Steering Committee Meetings were held over the course of the BOA planning process, each with a different focus. The diverse knowledge and expertise of the Steering Committee was drawn upon at critical junctures to discuss key elements of the plan and vet important ideas and approaches prior to public open house events. These meetings focused on a range of topics including refining the study boundary, articulating a vision, evaluating options and reviewing the Master Plan and key implementation and remediation strategies.

7. Greater Buffalo Niagara Region Transportation Council – 2030 Transportation Plan

Attachment C documents the public participation opportunities in connection with the preparation of the 2030 Long-Range Transportation Plan for Erie and Niagara Counties. There were numerous scheduled public informational meetings beginning in March 2006, a series of press releases, survey questionnaires, and written and oral comments received and reviewed by GBNRTC.

8. UB 2020 – Comprehensive Physical Plan for the State University of Buffalo

In addition to maintaining an interactive website for public information and comment on the UB 2020 plan, the University also held a public forum attended by over 1,000 people in April 2008 in order to air the 2020 plan. Attachment D provides information about the public participation process and summarizes the comments received both at the forum and electronically.

Attachment A

Event Description	Event Date	Event Time	Location
Framework Meeting	12/16/2004	10 – 11:30 p.m.	Niagara County Vantage Centre
Framework Meeting	10/26/2004	10:30 a.m. – 12:00 p.m.	Rath Building
Framework Meeting	9/28/2004	10:30 a.m. – 12:00 p.m.	Niagara County Vantage Centre
Framework Meeting	6/14/2004	10 – 11:30 a.m.	Rath Building
Framework Meeting	5/4/2004	10 – 11:30 a.m.	Niagara County Vantage Centre
Public Workshop A public meeting to review the team's progress on the Framework.	3/11/2004	7 – 9 p.m.	Harlem Road Community Center, 4255 Harlem Rd, Amherst
Public Workshop A public meeting to review the team's progress on the Framework.	3/10/2004	7 – 9 p.m.	NCCC, Building G, Room 244, 311 Saunders Settlement Rd, Sanborn
Framework Dialogue--Public Officials A meeting with public officials to review the team's progress on the Framework.	3/9/2004	9 – 11 a.m.	Orchard Park Town Hall Basement, 4295 South Buffalo St, Orchard Park
Framework Dialogue--Interest Group Representatives A meeting with representatives of local interest groups to review the team's progress on the Framework.	3/9/2004	7 – 9 p.m.	301 Crosby Hall, UB South Campus, 3435 Main St, Buffalo
Framework Dialogue--Public Officials A meeting with public officials to review the team's progress on the Framework.	3/4/2004	10 a.m. – 12 p.m.	Lockport Public Library, 23 East Av, Lockport
Framework Dialogue--Interest Group Representatives A meeting with representatives of local interest groups to review the team's progress on the Framework.	3/4/2004	7 – 9 p.m.	Town of Newfane Town Hall, 2896 Transit Rd, Newfane
Framework Dialogue--Public Officials A meeting with public officials to review the team's progress on the Framework.	3/3/2004	9 – 11 a.m.	Buffalo Zoo, Children's Resource Center, 300 Parkside Av, Buffalo
Framework Dialogue--Public Officials A meeting with public officials to review the team's progress on the Framework. (Note: Meeting space is not handicap accessible)	3/3/2004	6 – 8 p.m.	Cornell Cooperative Ext, 2nd Floor Meeting Room, 21 South Grove St, Suite 320, East Aurora
Framework Dialogue -- Public Officials A meeting with public officials to review the team's progress on the Framework.	3/2/2004	10 a.m. – 12 p.m.	City of Niagara Falls Council Chambers, 745 Main Street, Niagara Falls
Framework Dialogue--Public Officials A meeting with public officials to review the team's progress on the Framework.	3/2/2004	7 – 9 p.m.	Vantage Centre, Suite One, 6311 Inducon Corp Dr, Sanborn
Framework Meeting	1/20/2004	2 – 3 p.m.	Niagara County
Framework Meeting	12/16/2003	2 – 3 p.m.	Rath Building
Framework Meeting	11/18/2003	2 – 3 p.m.	Rath Building
Framework Meeting	10/21/2003	2 – 3 p.m.	Niagara County Vantage Centre
Framework Meeting	9/16/2003	2 – 3 p.m.	Rath Building

	14:00		
Framework Meeting	7/28/2003	2 – 3 p.m.	Rath Building
Framework Meeting	7/8/2003	3 – 4 p.m.	Niagara County Vantage Centre
Framework Meeting	6/17/2003	10 – 11:30 a.m.	Rath Building
Framework Meeting	5/20/2003	10 – 11:3- a.m.	Rath Building

Attachment B

Erie Canal Harbor Development Corp.

FOR IMMEDIATE RELEASE
February 10, 2009

CONTACT: ECHDC Press Office
Matt Davison
(716) 846-8258
www.eriecanalharbor.com

*****PUBLIC NOTICE: CANAL SIDE PROJECT*****

The New York State Urban Development Corporation, d/b/a Empire State Development Corporation (ESDC), as Lead Agency on behalf of its subsidiary corporation, the Erie Canal Harbor Development Corporation (ECHDC), will be preparing a generic environmental impact statement (GEIS) to assess the economic, social and environmental effects of undertaking the **Canal Side** project, a mixed-use waterfront development within the City of Buffalo's historic Erie Canal Harbor district. Your input is needed to help identify and define the scope of issues that will be examined in the draft GEIS. This notice is issued in accordance with Part 617 of the implementing regulations pertaining to Article 8 (State Environmental Quality Review Act) of the New York State Environmental Conservation Law.

**A Public Scoping Meeting has been scheduled on:
Wednesday, February 25, 2009 @ 7:00 p.m.**

The Waterfront School
95 4th Street
Buffalo, NY 14202
This building is accessible to disabled persons

If there is a need at the Public Scoping Meeting for any special accommodations for the hearing impaired, please contact us at the number below by close of business on February 20, 2009.

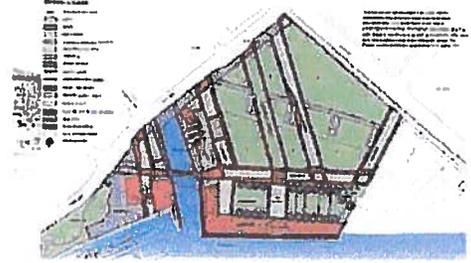
Written comments will also be accepted until 5:00 P.M. on March 13, 2009. Comments may be submitted to the lead agency: Paul Tronolone, Empire State Development Corporation, 95 Perry Street, Buffalo, NY 14203.

The draft scoping report for the project can be viewed at:
ESDC/ECHDC offices – 95 Perry Street, Suite 500, Buffalo, NY 14203-3030
Buffalo and Erie County Historical Society
Buffalo and Erie County Library – Downtown Branch
Online at: www.eriecanalharbor.com

**Questions? Contact:
Matt Davison, ECHDC, 716-846-8258**

###

Erie Canal Harbor Development Corp.



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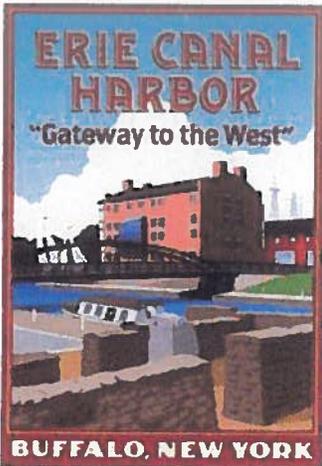
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Empire State Development
Created & Hosted Website
David A. Paterson, Governor

HarborCam
POWERED BY EARTHCAM, INC.



2009 Distinctive Destination

NATIONAL TRUST FOR HISTORIC PRESERVATION

Welcome to the Erie Canal Harbor Development Corporation Website



On behalf of the Governor's office, Empire State Development and Erie Canal Harbor Development Corporation (ECHDC), let me thank you for your interest in the redevelopment and transformation of Western New York's waterfront!

ECHDC's Board of Directors and dedicated staff remains committed to restoring the greatness of Buffalo's inner and outer harbor areas.

As a result, this website has been designed to help inform local residents, prospective visitors and other interested parties of the Corporation's efforts and progress. In addition, the site includes significant historical details, work-proposal requests, photos and other important information to help educate visitors on current and future projects administered or funded by ECHDC.

To access this information, please click on the appropriate links located in the upper-left and upper-right columns of this website.

Please visit us again soon!

Sincerely,

Jordan Levy
Chairman, Erie Canal Harbor Development Corporation

Latest Additions

[Community E-Bulletin Jan/Feb 2009](#) more...

[ECHDC Announces Outer Harbor Planning Progress](#) more...

[February Board of Directors Meeting Notice](#) more...

[Proposed Buffalo Harbor BOA Community Meeting Notice](#) more...

[ECHDC "Harbor Cam" Goes Live](#) more...

[Public Notice: Canal Side Project SEQRA Process – Scoping Meeting](#) more...

[Erie Canal Harbor Summer 2009 Programming Forms](#) more...

This Week's Photo:



Aud demolition continues on schedule!

II. FACTS AND CONCLUSIONS IN THE SEQRA PROCESS RELIED UPON TO SUPPORT THE DECISION

1. ESDC, as lead agency, conducted a coordinated review pursuant to SEQRA.
2. ESDC commenced the SEQRA process for the Project in July of 2007 by circulating a notice of intent to act as lead agency along with a Full Environmental Assessment Form to all then-known interested or involved agencies:
 - ECHDC □ NYSDEC □ NYSDOT □ OPRHP □ NYSDOS □ NYSTA □ Niagara Frontier Transportation Authority □ New York State Canal Corporation □ NYSOGS □ New York Power Authority □ Erie County Legislature □ Erie County Department of Planning & Environment □ Erie County Department of Health □ Erie County Fiscal Stability Authority □ Hon. Mayor Byron W. Brown □ Buffalo Common Council □ Buffalo Planning Board □ City of Buffalo Department of Economic Development, □ City of Buffalo Department of Public Works, Streets and Parks □ Buffalo Preservation Board □ Buffalo Fiscal Stability Authority □ Buffalo Urban Renewal Agency □ Buffalo Water Board □ Buffalo Sewer Authority □ Buffalo Municipal Housing Authority ("BMHA")
3. None of the interested or involved agencies objected to the ESDC acting as lead agency pursuant to SEQRA and the ESDC was properly established as the SEQRA Lead Agency for the Project in August of 2007.
4. Following a detailed sketch planning process with extensive public outreach and involvement, ECHDC unveiled a detailed concept plan for Canal Side in late 2008.
5. In February of 2009, ESDC issued a positive declaration for the Project requiring the preparation of the Draft Generic Environmental Impact Statement ("DGEIS").
6. Following issuance of the positive declaration, a Draft Scoping Report was issued. A Public Scoping Meeting to solicit comments on the draft scope was held on February 25, 2009 and a Final Scoping Document was issued in April of 2009.
7. Following issuance of the Final Scoping Document, the DGEIS was prepared pursuant to the requirements of SEQRA. On September 17, 2009, ESDC determined that the DGEIS was complete and adequate and accepted it for public review and scheduled a public hearing.
8. Copies of the DGEIS were made available for public review at ESDC offices and the Buffalo and Erie County Public Library – Central Branch. A copy of the DGEIS was also posted on the ECHDC website.
9. A Notice of Completion of the DGEIS and Notice of Public Hearing appeared in The Buffalo News on September 27, 2009 and the Environmental Notice Bulletin ("ENB") on October 7, 2009.
10. A Public Hearing was held on October 20, 2009 at the Albright-Knox Art Gallery. Due to extensive public interest in the Project and several requests made during the DGEIS public hearing, the public comment period, originally scheduled to expire on November 2, 2009, was extended until November 17, 2009.
11. Following publication of the DGEIS, a number of commenters expressed opposition to the proposed Commercial Slip Parking Garage component of the Project and/or expressed deep concerns about the impacts of the proposed Commercial Slip Parking Garage on the residents of the Marine Drive Apartment Complex ("Complex"). In order to address the Complex residents' concerns, ECHDC developed and implemented an engagement plan specifically for residents of the Complex. Pursuant to that plan, in early December, 2009, ESDC mailed to all residents of the Complex a Project Fact Sheet, Project Description of the Commercial Slip Parking Garage and preliminary renderings of the proposed Commercial Slip Parking Garage. Also, a meeting with Complex residents was held on December 17, 2009, where their concerns were heard.
12. In order to address the concerns and issues raised, and to ensure that any adverse environmental impacts associated with the Parking Garage were thoroughly and comprehensively addressed in the GIEIS

for the Project, ECHDC directed its Project Design and Environmental Teams to prepare a Supplemental Analysis Report ("SAR") to specifically assess the need for and the environmental impacts from the Commercial Slip Parking Garage to the Complex. The SAR and its content were included in the FGEIS.

13. An additional meeting was held with Complex residents on March 1, 2010, to review the results of the SAR and open a dialogue on remaining issues of concern. Additional meetings with Complex residents are anticipated.

14. The Final Generic Environmental Impact Statement ("FGEIS") was issued by ESDC on January 21, 2010 and a notice of completion of the FGEIS appeared in the ENB on February 10, 2010.

15. The FGEIS was mailed to the interested and involved agencies and copies of the FGEIS were made available for public review at ESDC offices and the Buffalo and Erie County Public Library -- Central Branch. A copy of the FGEIS has also been posted on the ECHDC website. Pursuant to SEQRA, the FGEIS was held open and available for more than 10 calendar days in order to afford agencies and the public a reasonable time period in which to consider the FGEIS before ESDC issued its written findings statement.

16. ECHDC has carefully and thoroughly reviewed the information contained in the DGEIS, including all appendices and the comments to the DGEIS, and the FGEIS including all appendices (collectively referred to as the "GEIS"). ECHDC finds that the GEIS provides a thorough examination of all of the important potential impacts that would result from undertaking the Project. ECHDC has carefully reviewed, questioned and analyzed the various impacts of, alternatives to, and potential mitigative measures for the Preferred Alternative and weighed these issues against the social and economic benefits of the Preferred Alternative and other essential considerations.

17. ECHDC recognizes that qualified experts on any topic may differ in their conclusions and, in particular, may differ in the judgments employed during analysis. Nevertheless, ECHDC has carefully reviewed many hundreds of pages of documentation on the various issues that have been submitted by government agencies, experts, interested stakeholders and the general public that reflect hundreds of hours of examination of the Project during a SEQRA process that has taken more than two years. On balance, and after careful consideration of all relevant documentation and comments, ECHDC believes it has more than adequate information to evaluate all of the benefits and potential impacts of the Project as a basis for considering whether to undertake the Project.

Appendix I Public Review Program

The GBNRTC officially adopted an updated *Public Participation Plan* - formerly the GBNRTC Public Involvement Policy Statement - in January 2007, specifying actions to be followed for certain GBNRTC activities. The policy specifically outlines the opportunities and process to be followed for development of the LRTP and TIP. The public participation program seeks to provide continuing opportunities for individuals and community groups to participate in the planning process. Opportunities are provided for public input at all stages of planning and project development process. The efforts undertaken in the development of the LRTP and TIP are consistent with the GBNRTC official Public Participation Plan.

2030 Long-Range Plan Public Participation Opportunities Regional Summit

To kick-off development of the 2030 Long-Range Transportation Plan for Erie and Niagara Counties, the GBNRTC held a Regional Summit in March 2006. Those who attended this full-day event represented business groups, environmental organizations, cross-border interests, colleges and universities, and social and community organizations. Over forty representatives attended the Summit to discuss a variety of issues relevant to the region's future.

Environmental Summit

In Fall 2006, the GBNRTC participated in an Environmental Summit sponsored by the Center for Sustainable Growth at Damien College. The GBNRTC provided attendees with information regarding the development of the 2030 Long-Range Transportation Plan including ways to get involved in the planning process. The event attracted over 100 attendees.

2030 Long-Range Transportation Plan Open Houses

The GBNRTC hosted a series of four public open house meetings in January/February 2007 to share information and solicit community comment on the development of the 2030 Long-Range Transportation Plan. Participants had an opportunity to learn and comment on work completed including a review of the existing transportation conditions in the region, a future transportation needs, the goals and objectives of the Plan, and potential projects. Open house meetings were held at the dates, times and locations below:

Tuesday, January 23, 2007 – Buffalo and Erie County Public Library, Central Meeting Room 2nd Floor, 1 Lafayette Square, Buffalo, NY 1p.m.

Thursday, January 25, 2007 - AAA Travel & Insurance Center
100 International Drive, Williamsville, NY 6 p.m.



Tuesday, January 30, 2007- Carnegie Building
1022 Main Street, Niagara Falls, NY 1 p.m.

Thursday, February 1, 2007- Lockport Town Hall
6560 Dysinger Road, Lockport, NY 6 p.m.

One-on-One and Small Group Discussions

The GBNRTC initiated one-on-one interviews and/or small group discussions with community leaders and other identified members of traditionally underrepresented communities to discuss the transportation planning process and identify key issues and concerns.

2030 Long-Range Transportation Plan Website

The GBNRTC created a website dedicated to 2030 Long-Range Transportation Plan development. It provided visitors with opportunities to learn more about the MPO, the planning process, the Long-Range Transportation Plan, and ways to get involved in the process.

GBNRTC Public Forums

In January 2007, as part of a GBNRTC Policy Meeting, the GBNRTC held a public forum to encourage the public to discuss regional issues related to the 2030 Long-Range Transportation Plan with State and local transportation leaders.

Official Review Period and Policy Committee Action

The official public involvement and review period for the 2030 LRTP and 2008-2012 TIP officially began May 5, 2007 and extended a minimum thirty (30) days as specified by the GBNRTC Public Participation Plan, through June 4, 2007.

The official public notice was placed in several local newspapers and the draft LRTP and TIP was also made available. Efforts to inform the public are documented in separate sections to follow.

On May 23, 2007, the GBNRTC LRTP Subcommittee received a summary of the comments and all written correspondence to-date received during the public comment period via email. On the same day, the GBNRTC Transportation Projects Subcommittee discussed these materials during their monthly meeting. The Planning and Coordinating Committee was given a presentation on the full public feedback at their regular meeting on June 6, 2007, prior to making their program recommendations to the Policy Committee. The Policy Committee formally acted on the TIP and LRTP recommendations on June 22, 2007.

Public Meetings

Four public meetings were held in geographically different areas throughout the region to present the proposed LRTP and TIP and seek citizen review and input. Meetings were held in both the cities of Buffalo and Niagara Falls as well as suburban locations in Niagara and Erie Counties. The public was encouraged to review the Plan and Program, to make verbal comments at these public meetings and/or submit a written statement.

For the LRTP and TIP development process, the GBNRTC conducted the four public meetings at the dates and locations below:

Tuesday, May 8, 2007 - Quality Inn
7708 Niagara Falls Blvd., Niagara Falls, N.Y.



Thursday, May 10, 2007 - Lockport Town Hall
6560 Dysinger Road, Lockport, NY

Tuesday, May 15, 2007 - AAA Travel & Insurance Center
100 International Drive, Williamsville, NY

Thursday, May 17, 2007 - Buffalo and Erie County Public Library
Central Meeting Room 2nd Floor, 1 Lafayette Square, Buffalo, NY

The official public comment period began on May 5, 2007 with the publishing of a legal notice in all major newspapers and minority publications in the two-county region. Legal notices were placed in the Buffalo News, Niagara Gazette, Metro Community News and the Buffalo Criterion. Copies of the actual advertisements are attached. The legal notices explained the LRTP and TIP development process, the multiple opportunities for public comment, and where the draft LRTP and TIP could be reviewed. The notice also announced the dates and locations for four (4) scheduled public informational meetings.

A series of press releases were scheduled to coincide with the start of the public review period and the public meetings. News releases were sent to the Buffalo News, Lockport Union-Sun Journal, Niagara Gazette, Amherst Bee and Business First. Broadcast media included WGRZ, WBEN, WIVB, WKBW, WBFO, WNED, and WBEN.

As for accessibility to the proposed LRTP and TIP document itself, a downloadable summary of the draft LRTP and TIP and associated materials were posted on the GBNRTC web site. That same information was published and distributed to all public libraries throughout Erie and Niagara Counties on May

5, 2007. Furthermore, the public was also invited to visit the GBNRTC offices during normal business hours.

Public Meeting Agenda

GBNRTC Executive Director Hal Morse opened each of the public meetings with a welcome, introduction and overview of proposed LRTP. GBNRTC Principal Analyst Timothy Trabold then explained the TIP development and project selection process and funding implications of the TIP. He provided a summary of the program and highlighted how certain projects were implementing the region's long-range vision.

After the formal presentation, the remainder of the meeting was devoted to public comments and questions. Handouts were provided to those attending these public meetings summarizing projects proposed in the draft TIP.

The staff also took the opportunity to survey meeting attendees with a questionnaire to determine their opinions on a number of issues relative to the GBNRTC public outreach procedures. Questions asked included how they learned of the meeting, if the time and date were convenient, their reaction and feelings towards the LRTP and TIP presentation and materials distributed. This feedback is used to benchmark and continually adjust public outreach procedures. A sampling of the results is provided in the following table:

	Provided appropriate ways to access TIP information	Presentation provided me with the information I needed to better understand 2006-2010 TIP	Handouts provided useful supporting material	Presenters adequately responded to my comments
Agree Strongly	40%	40%	40%	27%
Agree Somewhat	27%	40%	47%	27%
Disagree Somewhat	20%	13%	7%	
Disagree Strongly				7%
Don't know	7%			
No Response	7%	7%	7%	40%



Written Correspondence Received:

Written comments on the draft LRTP and TIP were received throughout the public comment period by both postal delivery and Internet email. Correspondence was received from the following individuals and is attached.

- Lynda Schneekloth
- Rick Gillert
- Keith Belanger
- Joseph Kuebler
- Rob Hirner
- Laura Karnath
- Dan Gardner
- Amy Pickard
- Louis Messana
- Kirk Laubenstein
- Richard Soluri
- Brian McMahon
- Gladys Gifford

GBNRTC Response to Public Comments Received

The GBNRTC staff provided written correspondence to the majority of comments received in an effort to both acknowledge the seriousness of public feedback and to establish a resolution path to the issue(s) raised. Email comments were responded to with the following message:

Thank you for your comments regarding the 2030 Long-Range Transportation Plan for the Erie and Niagara County Region. Your input is greatly appreciated and will be shared with review team members and other decision-makers prior to

adoption of the Plan. Please check out our website at www.gbnrtc.org for current information on transportation-related planning activities in the region and ways to get involved in the process. Thank you once again for your comments.

Summary of Comments received at Public Meetings

LRTP & TIP Public Meeting at the Quality Inn, 7708 Niagara Falls Blvd, Niagara Falls, NY, 6 p.m. – May 8, 2007

Statements/comments made:

- James Hufnagel, Niagara Heritage Partnership Expressed support for the removal of the Robert Moses Pkwy and suggested that the project be expanded up to Devil's Hole. Expressed concerned over potential for terrorism near the Power Project.
- Sam Ferraro, Commissioner, Niagara County Department. of Economic Development: Requested that the following be mentioned in the Plan: the Niagara River Greenway Plan, the Oz Central development, the outer harbor break wall in Olcott, restoration of the Flight of Five locks, development of a new airport terminal at the Niagara Falls International Airport, and Youngstown ferry service initiative.
- Lisa Vitello, Citizen Expressed support for the removal of the Robert Moses Pkwy. Submitted a petition signed by over 60 community



groups. Mentioned the need for preservation of the gorge area.

- Michelle Vanstrom, Citizen (*Statement submission*)
Expressed support for removal of the Robert Moses Pkwy
- John Simon, Oz Central of New York
Stressed the need for infrastructure improvements in Niagara County and Western New York to support economic development projects. Mentioned that the EIS is progressing as needed for the Oz Central project to move forward.

- Vincent Marneli, Niagara Falls Tourism Advisory Group
Questioned why signs were up for the tourist center before the tourist center was built. Commented that the Robert Moses Pkwy in Lewiston has only limited use; Highland Avenue is a more direct route to Niagara Falls. Stated that the Niagara River needs to be reclaimed and promotion is needed of the lower rapids as a tourist attraction. Suggested that the three international bridges be segregated by use; autos, pedestrians, trucks. Suggested the Niagara Falls International Airport promote tourism in the area to bring people here, not just away to Myrtle Beach. Questioned who is in charge of the "Question Mark" information signs and suggested that the signage be regulated.

The following answers were given to general questions raised:

- The organization responsible for a project typically lets and awards the construction contracts according to very specific federal guidelines.
- Major regional development activities are constantly monitored to identify needed infrastructure support. These include Oz Central, the Outlet Mall, the Niagara Falls International Airport, and the Seneca Niagara Casino.
- There is some flexibility in how federal funding can be used to fund a project but many funding sources have specific purposes they are to be used for such as on interstate facilities.

L RTP & TIP Public Meeting at the Lockport Town Hall, 6560 Dysinger Rd, Lockport, NY, 6 p.m. – May 10, 2007

Statements/comments made:

- George Muscato, Citizen
Asked about design specifics and involvement process for the Lincoln Road project.
- Pat Schrader, Alderman
Requested demographic information for zones in the Lincoln Road vicinity.

L RTP & TIP Public Meeting at the AAA Travel & Insurance Center, 100 International Dr, Williamsville, NY, 6 p.m. – May 15, 2007

Statements/comments made:

- Thomas Frank, Citizen



Attachment D

Public Participation in UB 2020 Planning Effort

(from the UB 2020 Website

http://www.buffalo.edu/ub2020/plan/get_inv_feedback_phase2.html)

Planning Calendar



The Building UB team is leading a careful and inclusive planning process designed to produce an exemplary plan that will meet the needs of students, faculty, and staff and enjoy the support of alumni and the community at-large.

The planning process is designed to bring together the expertise of a high quality consultant team with the deep local knowledge of all the members of the UB community. The planners continue to reach out to a wide range of constituencies - on campus and off - to make sure the end result reflects the values, needs, and mission of the greater UB community.

The work is proceeding in five major steps: (0) a period of planning to plan; (1) definition of the vision, guiding principles, and strategic considerations; (2) a review of emerging concepts for campus development; (3) presentation of a draft master plan; and (4) commencement of a concerted implementation campaign.

Planning to Plan

FALL 2006 · SUMMER 2007

The pre-planning phase began with President John Simpson's community address in October 2007 and continued with broad consultation with campus and community constituencies; liaison with local government partners; research on campus precedents from around the nation; information gathering on existing conditions on three campuses; and the selection and contracting of a consulting team led by Beyer Blinder Belle of New York City.

Phase I: Vision, Strategic Considerations, Guiding Principles

FALL 2007

UB staff and the consultants kicked off work on the plan in August 2007. After a period of reconnaissance and information gathering, the Building UB team developed a detailed statement of challenges and opportunities in five thematic areas: urban design, transportation and way-finding, landscape and environment, condition of the learning landscape, and historic resources of the three campuses as the basis for further work.

The team's facilities condition sub-consultant, VFA, also began a detailed audit of the physical condition of every building owned or leased by UB. Phase I work culminated in a public review of "vision, principles, and strategic considerations" in a day-long public event at the new UB Downtown Gateway facility.

- [Phase I Work: Vision, Strategic Considerations, Guiding Principles](#)

Phase II: Campus Concepts

SPRING 2008

Working from their description of what is, the consultants developed an array of ideas about what might be in the future of UB. These "campus concepts" included a broad range of ideas for mitigating weather conditions, promoting alternative modes of transportation, creating new spaces for learning, developing complementary facilities to support university programs, and improving the design of UB campuses (for example, by connecting the Ellicott to the Spine and the Spine to Lake LaSalle).

These concepts were arrayed against a set of alternative scenarios for university growth - one in which academic units would grow in their current locations, and two others in which health sciences schools would migrate to a new downtown campus with some professional schools would relocate to South Campus.

The Center for The Arts was the venue for another open public forum in April 2008 when staff, students, faculty, "place-making" professionals, and members of the general public assembled to review and critique the campus concepts.

- [Phase II: Campus Concepts](#)
 - [Introduction](#)
 - [North Campus](#)
 - [South Campus](#)
 - [Downtown Campus](#)
 - [Learning Landscape](#)
 - [Transportation](#)
 - [Capital Projects](#)
 - [Campus Concepts Posters](#)
 - [Your Feedback On Phase II](#)

Phase III: Draft Plan

FALL 2008

The current phase of work focuses on translating concepts and ideas into a specific plan for the long range development of UB campuses. It will still be a draft and still open to change. But it will also be a specific set of proposals based on an agreed-upon location of academic and support programs to specific campuses. It may include some alternatives that remain to be tested, but it will mainly include specific proposals for facilities to be located in specific places.

The draft plan will be delivered as a package of recommendations and presented to campus constituencies and the public at-large for a detailed review and critique at a major public event to be held on South Campus on November 19, 2008. The plan will address each of UB's campus centers - North, South, and Downtown - and propose measures to deal with transportation connections among the campuses and between surrounding communities and UB locations.

November 19, 2008

Forum #3: Draft Plan | Sign up for a reminder using the box on the right

Phase IV: Final Plan and Implementation Launch

SPRING 2009

The final Comprehensive Physical Plan will be produced as a document incorporating the fully-elaborated vision for the future of UB's three campuses. It will encompass a full array of policies, projects and program to realize the vision as well as the enumeration of action items, responsible parties, implementation steps, phasing schedules, and funding mechanisms necessary to get the job done.

This final plan, however, will not merely be laid upon the table. It will be the subject of a concerted university-wide campaign to prioritize projects, focus resources, and monitor progress on implementation until the plan is fully realized. A fourth major public event is scheduled for April 22, 2009 at a location to be determined not only to present the plan but to formally inaugurate the implementation campaign.

Your Feedback On Phase II

A narrative summary of comments from the April 22 Public Forum and from the Building UB website

Nearly 1,100 people participated in our April 22, 2008 Public Forum at the Center for the Arts. Nearly 300 of those people filled out comment cards and dozens more people submitted comments electronically to the Building UB website.

Campus Concepts Report

[Analysis of Campus Concept Feedback](#)

[Complete comments \(verbatim\) from Building UB Forum II](#)

These comments reflect the profound interest, deep knowledge, and obvious thoughtfulness which staff, faculty, students, place-making professionals, and members of the broader community brought to their review of the Phase II presentation.

This is a narrative summary of an analysis of those comments based on a careful reading and sorting of all the cards and on-line submissions. You can read all the comments verbatim - nearly 60 pages - on the PDF linked here. You can also see our analysis table that shows how we sorted the comments in an effort to identify some of the dominant ideas in the conversation.

What follows is really just the "headlines" based on a very full day of work by the UB community. But this feedback - in its broad thrust and in its details - is already helping drive the continuing work of the Building UB to create a campus master plan for a great public research university.

Program Locations

- There is a wide variety of views about the appropriate locations of things - Law School, Academic Health Center, etc. - and a general understanding that there are a lot of problems to be solved in transportation, student services, scheduling, technology, and relationships in having three campuses.

Transportation

- While it is agreed that the university depends on people being able to drive to our campuses and park there is a growing understanding that SOV commuting can no longer be a right. We have to consider new pricing policies, promote alternative modes of transportation, and figure out how to build structured parking.
- There was a strong sense that public transit has to play a bigger role in the life of our campuses, likely with a rail connection to South, but also with better bus service to the whole region, improved shuttle service, and some kind of universal transit pass at least for students.
- There is a lot of support for measures to promote bicycling as an alternative including the creation and designation of safe routes and bike paths, secure storage, showers, information, and more.
- Concerns about the pedestrian environment focused on issues of safety at particular locations (Putnam, Audubon, Flint & Maple, Main, Goodell) and issues of comfort and weather protection especially on North Campus. Maybe some of our North Campus thoroughfares can be “downsized.”
- A much wider array of possibilities need to be explored, including Zipcar, car-pooling, flex-time, telecommuting, teleconferencing and more.

Sustainability

- Participants understood that making our campuses more sustainable means alternative modes of transportation, more energy-efficient buildings, exploring the possibilities of generating our own renewable power, and shaping patterns of development in more efficient ways.
- People seemed to like the idea of creating a new recreational and naturalized “greenbelt” around the North Campus.

North Campus

- Across the board, participants agreed that making stronger connections to Lake LaSalle, providing access, and bringing life to the water, made sense for North Campus.
- The idea of building a new “Main Street” to connect the Spine to the Ellicott Complex drew favor in general, but with a warning that the path should be weather protected or enclosed.
- Many members of the staff wanted to know “what about Crofts Hall”? It’s neglected, isolated, underserved and in need of repair. What do we do?

South Campus

- Many people identified the need to improve our connections with the surrounding communities both physically and programmatically.
- Many others suggested that UB should become an active partner in stabilizing and redeveloping the University Heights neighborhood for better housing, business districts, and public safety.
- Public safety was a concern for all three campus locations - but especially on South.

Downtown Campus

- Participants displayed a rather sophisticated understanding that UB’s presence Downtown needs to be internally coherent and well-identified and at the same time well-integrated with UB’s partners on the medical campus.
- Specialists in the staff session identified a range of issues that need attention, including the need to support an inter-professional model of medical education, to support the needs of patients in clinical trials, and design a continuum of spaces for activities from educational to clinical to research to commercialization.
- Many others pointed to the necessity of UB cultivating strong relationships and connections with the adjacent neighborhoods and to support them in their endeavors.
- There was strong support for pursuing adaptive re-use strategies making use of existing buildings downtown, starting with the Trico factory building, and going beyond.
- Some were concerned that new buildings - especially the mega-structured illustrated in the presentation - would be out of scale with the district and its neighbors.
- Several asked how we would define the new “UB Gateway” as something more than the sum of its parts.

Other issues

- There was lots of interest in the “Learning Landscape” concepts, but also a lot of questions about cost, management, maintenance, security, and more.
- The idea of using glass (and replacing brick) to open up the North Campus found a lot of favor. Others called for more exciting architecture and public art.
- People were interested in a wider array of food service choices, hours, locations, etc.
- There was support for improved retail services - but not at the expense of South Campus area businesses.
- A fitness center - or one on each campus - drew enthusiastic support.
- Many supported the idea of libraries as a quiet place for study, consultation with librarians and browsing for books
- Others emphasized the need to design to suit the climate - including a winter garden.

**Key Organizations Involved in Economic Development In
Erie County**

Key Organizations Involved in Economic Development in Erie County¹

Erie County Department of Environment and Planning – Office of Economic Development

<http://www.erie.gov/environment>

The Office of Economic Development (OED) is responsible for providing information and assistance to the business community, and for the development of business sites that provide the opportunity for business attraction and expansion.

These responsibilities are delivered through the following services provided by the OED:

- Business Liaison and Technical Assistance
 - Business Retention and Expansion Program
 - Land Development and Economic Development Planning Studies
 - Brownfield and Urban Redevelopment
-

Business Liaison and Technical Assistance

The OED is a resource for individuals and businesses of "any size" for questions and for direction to the appropriate agency(ies) that can assist with their needs and/or opportunities. In addition, the OED has developed online resources that provide information to the business community, and promote and encourage business expansion for manufacturers located in Erie County.

Business Retention and Expansion Program

The goal of OED's business retention and expansion program is to enhance communication between the private sector and public sector by personally visiting the companies at their facilities. The objective is to learn about the company, and introduce and facilitate contact with local agencies that provide business assistance. Started in November of 2000, the OED has visited over 160 manufacturers and warehouse/distribution companies.

¹ Information on the organizations included in this section was largely obtained, often verbatim, from the websites of the organizations themselves. It should be noted that in addition to the organizations described in this section, there are numerous others whose activities directly or indirectly contribute to the economic development of the County of Erie, some of which are mentioned in other sections of the CEDS.

OED works in conjunction with and compliments the efforts of the Buffalo Niagara Enterprise (BNE) business retention and expansion program. The BNE target industries include back office operations, medical and Canadian owned business. The OED works together with the BNE on developing common policies countywide, and on a common database for tracking information.

Land Development and Economic Development Planning Studies

OED is charged with developing land for industrial use. OED works with municipalities and developers, providing technical and financial support to develop shovel ready properties. To encourage smart growth, OED also provides technical assistance and financing for economic development planning studies.

Brownfield and Urban Redevelopment

The urban center and first ring suburbs are now victims of their earlier success in attracting industry and commerce to the Western New York area. Often these lands are dotted with urban blight or are considered brownfields, which mean these lands may have some level of contamination. Brownfield sites range from abandoned gas stations to rail yards and former heavy industrial manufacturing plants.

The OED brownfield services offers technical assistance and financing tools to encourage redevelopment of these sites. The OED will provide facilitation services among environmental agencies and the project's redevelopment team.

Erie County Industrial Development Agency

<http://www.ecidany.com>

The Erie County Industrial Development Agency (ECIDA), is a public benefit corporation created in 1970 by an act of the New York State Legislature to promote and assist private sector industrial / business development thereby advancing job opportunities and economic welfare to the people of Erie County. It is the economic development corporation for Erie County. ECIDA is self-funded; 90% of its budget comes from fees.

ECIDA is in business to grow business in Erie County by helping business be competitive and profitable. Its programs include:

- Financial Assistance, Loans, Venture Capital
- Work Force Development, Training
- Business Incentives, Tax Exemptions, Bonds

- Transportation, Infrastructure Financing
- International Trade Assistance
- Referrals and Resources (to/from other economic development organizations)
- Facility / Brownfield Development

Other IDA's in Erie County

In addition to the Erie County Industrial Development Agency, there are 5 towns within the County which have their own industrial development agencies: Amherst, Clarence, Concord, Hamburg and Lancaster. All 6 IDA's in the County, however, operate under the same Uniform Tax Exempt Policy making the tax incentives and related policies the same for all communities within the County. The individual town IDA's primarily offer financial assistance in the form of tax abatement for eligible projects. Some of the local IDA's, however, are also involved in additional economic development activities such as efforts to spur redevelopment in Enhancement Zones.

City of Buffalo

Office of Strategic Planning

http://www.ci.buffalo.ny.us/Home/City_Departments/Office_of_Strategic_Planning

The Office of Strategic Planning provides overarching strategic assessment and management of general planning and policy issues that have citywide, inter-jurisdictional and regional significance. The Office of Strategic Planning identifies long term, cross-cutting city-wide issues that broadly affect quality of life and economic vitality.

The Office of Strategic Planning helps to focus direction, identify new opportunities, and deliver priority projects in an integrated and expedited fashion consistent with the approved work program. In this way, important initiatives requiring the rigor of strategic planning to marshal the creative thinking and resources necessary are initiated and completed expeditiously.

The Office of Strategic Planning provides centralized, broad strategic assessment and management of general planning, economic development, housing and other policy issues having significance to the Mayor's Office, Planning Board, Common Council, Buffalo Urban Renewal Agency Board, Buffalo Economic Renaissance Corporation Board, and the Buffalo Neighborhood Revitalization Corporation Board, expeditiously utilizing technical information generated by the Office of Strategic Planning for the purpose of facilitating the pursuit of long-term and priority projects.

Economic Development (BERC) (to be merged with BURA)

<http://www.berc.org>

The Business Development Group is responsible for providing an array of services and programs to help retain and expand existing City firms. The Buffalo Economic Renaissance Corporation (BERC) will be the lead agency in this effort. Special emphasis is given to the retention and

growth of Small, Women & Minority owned firms. The Business Development Group also carries out a series of marketing and business recruitment activities designed to attract new businesses to the City. Working closely with the Erie County Industrial Development Agency (ECIDA), Buffalo Niagara Enterprise (BNE), and Development Downtown Incorporated (DDI) the Business Development Group provides site assistance to expanding, existing firms or new firms considering a location in the City.

The Business Development Group also provides professional, technical assistance services for small and minority-owned businesses. These services include assistance with business management, marketing, financing, personnel administration, and other related small business needs. Partnerships with other agencies such as the Small Business Development Center (SBDC) allow the Business Development Group to provide these services.

The Business Development Group is also responsible for operating Small Business Resource Centers throughout the City of Buffalo, which provides assistance to businesses outside of City Hall and into the community, managing the Bond Readiness Program and the Commercial Area Revitalization Effort (CARE) Program.

The **Business Financing and Incentives Group** facilitates access to and administers several business financing and incentive programs. Such programs include: the Business Loan Fund, the SBA Micro Loan Program, Neighborhood Micro Enterprise Loan Program; Minority Contractor Loan Program, Entrepreneurial Assistance Program, Commercial Area Revitalization Effort, and Empire Zone Program

Buffalo Urban Renewal Agency(BURA)

http://www.ci.buffalo.ny.us/Home/City_Departments/BURA

The Buffalo Urban Renewal Agency (BURA) is a public benefit corporation that was formed, by an act of the New York State Legislature, in 1966. Its corporate purpose includes the general planning and operation of various urban renewal programs designed to prevent or eliminate blight and deterioration in the City of Buffalo. Such programs include:

- real estate acquisition and clearance
- housing rehabilitation and construction for low-moderate income individuals
- design and construction of site improvements and public facilities
- provision of grants and loans to facilitate rehabilitation of residential and business properties,
- other programs designed to stimulate urban economic growth and to revitalize urban neighborhoods.

Funding for the various programs conducted by BURA is obtained from the Federal government, through the City of Buffalo. In effect, BURA acts as an agent of the City in carrying out its urban renewal activities. Because of its close administrative and financial relationship with the City,

BURA is considered to be a component unit of the City of Buffalo for financial reporting purposes.

Buffalo Urban Development Corporation (BUDC)

<http://www.buffalourbandevelopment.com>

The Buffalo Urban Development Corporation (BUDC), formerly known as Development Downtown, Inc. (DDI), was incorporated under Section 402 of the New York State Not-for-Profit Corporation Law in May of 1978. The original public objective of the Corporation was the economic development of a defined area of downtown Buffalo. The stated purpose of the Corporation at its inception was to:

- administer certain federal grant and local loan programs
- oversee development and construction projects
- plan public works and services
- implement and administer an urban action strategy

In August of 2004, a Certificate of Amendment of the Certificate of Incorporation of Development Downtown, Inc. was filed to change the name of the Corporation to Buffalo Urban Development Corporation (BUDC). In addition, the amendment changed the composition of the members and directors; and expanded the purpose, mission, roles, responsibility and geographic area of the Corporation's activities. Now BUDC's public objective of economic development has been changed to include the municipal limits of the County of Erie, primarily in the City of Buffalo.

The purposes of the Corporation have been amended to:

- provide a vehicle to stimulate private investment in regionally strategic development areas
- implement regional priorities
- serve as a real estate holding company for public-sector projects
- serve as a conduit for public funding for urban projects of regional significance
- serve as a liaison among public and private development entities
- provide oversight and strategic visioning for the region's urban and high-impact project agenda
- inform the formulation and setting of regional development and project priorities
- administer the proposed Regional Development Fund, Downtown Redevelopment Fund and other funds to be established for development of regionally significant projects in the County of Erie.

The mission of the Corporation is to create a dynamic and responsive project development process and team, capable of meeting the special needs and challenges associated with urban and high impact project development in Erie County. Funding for the operation of the Corporation was initially provided by the City of Buffalo; however, the City has not

allocated funding to the Corporation for several years, and future allocations are not expected. Income is generated primarily through land sales, grant sources and loan repayments.

Primary accomplishments of the Buffalo Urban Development Corporation are:

- Development of the 185 acre **Buffalo Lakeside Commerce Park (BLCP)**, the premier brownfield redevelopment in the City of Buffalo. Through the use of State, County, National Grid and City funds, BUDC has transformed the former Union Ship Canal/Hannah Furnace site into a “development ready” site. Public investment in the project is estimated at nearly \$30 million and remediation of the site and infrastructure development has occurred through a phased approach. To date CertainTeed Corporation, Cobey, Inc. and Sonwil Distribution have made multi-million dollar investments resulting in the build out of 660,000 square feet of new manufacturing and/or distribution space in BLCP and employment of approximately 400 workers. Within BLCP, will be located 20+ acres of waterfront greenspace around the Union Ship Canal – a \$7.2 million project being co-developed by the City of Buffalo and Erie County. Roughly 90 acres remain available for sale and development in the park.
- **RiverBend Commerce Park (RBCP)**, located to the north of Buffalo Lakeside Commerce Park in the City of Buffalo, once the site of heavy industry, much of the site has been remediated to commercial standards. It is comprised of approximately 260 acres and is bordered on the north by the Buffalo River and on the west by a major rail corridor. To date approximately 30 acres of the site have been redeveloped (for a 150,000 square foot manufacturing facility for Rittling Industries (formerly known as HydroAir Components). BUDC is currently initiating preparation of a RiverBend Site and Development Plan which will eventually lead to the construction of internal service roads and utilities to position the site for additional redevelopment
- **Elk Street Corridor** is a more than 300-acre area of mostly industrial properties in South Buffalo which has been targeted for remediation and redevelopment. In 2008, BUDC engaged consultants to study the area and prepare a master plan for redevelopment for a mix of back office, light manufacturing, distribution and retail uses. The master plan also calls for increased public access to the Buffalo River shoreline, including a new park at the foot of Babcock Street, a pedestrian bridge across the river linking the site to the RiverBend Commerce Park and another park with hiking trails and river overlook at the southern tip of the former Buffalo Color Corp. property. It is anticipated that the majority of sites in the Corridor will remain under private ownership though some would be under local government control in order to attract private investors and/or create public access. The Elk Street Corridor plan has since been folded into the ongoing South Buffalo Brownfields Opportunity Area study to serve as a planning tool.

Buffalo Niagara Partnership

<http://www.thepartnership.org>

The Buffalo Niagara Partnership includes nearly 2,500 employer members, and its purpose is to improve business competitiveness and expand economic activity in the region. The Partnership offers programs and services to its members to increase their chances for business success.

Among its programs are:

Advocacy: The Partnership advocates for Buffalo Niagara's private employers in Albany and Washington to improve the area's business climate through policy changes intended to remove obstacles that impede investment and job growth in our region.

Business Development: The Partnership provides strategic support for companies in thriving industry sectors like advanced manufacturing, life sciences, logistics, professional services, renewable energy and agribusiness. Through business development programs like its young professionals group Buffalo Niagara 360 and its business intelligence experts, The Partnership helps local companies achieve success.

Convening: The Partnership provides its members with opportunities to convene, all of which are intended to improve a company's bottom line. Activities include the Networking with a Twist series, the issue-oriented Movers & Shakers Forums, councils and committees, the HobNob or our roundtable discussion groups, among others.

Buffalo Niagara Enterprise

<http://buffaloniagara.org>

Buffalo Niagara Enterprise (BNE) is a nonprofit, private business development and regional marketing organization which showcases the region as an ideal place for businesses to locate, grow, and start up. The BNE is made up of a team of local investors, a board of directors, economic development partners, and professional staff. Its mission is to attract business investment to Buffalo Niagara.

Buffalo Niagara Enterprise (BNE) provides comprehensive economic development assistance to new and existing companies doing business in the eight counties of Western New York. Its services run the gamut from demographic information to tax incentives to site identification, and include:

Business Attraction - BNE is the central clearinghouse for the information and supporting services required by companies interested in locating and growing in the region. It provides market data and other information services relevant to business location decisions, including economic indicators, workforce information, industrial and commercial real estate information and customized business development data.

Professional Consultation on Business Locations - BNE provides professional account management services, offering potential investors in our region a one-stop shop for information on economic development, and serving as a liaison with local economic development organizations.

Regional Collaboration - BNE works with economic development professionals, board of director members and other investors in Buffalo Niagara Enterprise to build region-wide support for economic development and marketing. Working with economic partners throughout the eight counties, BNE has developed a comprehensive regional economic development response plan that demonstrates a shared commitment.

Marketing & Public Relations - Through programs like its popular “Where Life Works” campaign, BNE promotes the Buffalo Niagara region as a place that is ideal for business investment and growth.

Greater Buffalo Niagara Region Transportation Council (GBNRTC)

<http://www.gbnrtc.org>

GBNRTC is the Metropolitan Planning Organization (MPO) for Erie and Niagara Counties. It is comprised of seven members, representing the major political jurisdictions and transportation agencies in the region. Member agencies include the City of Buffalo, City of Niagara Falls, County of Erie, County of Niagara, NYS Thruway Authority, the Niagara Frontier Transportation Authority, and the NYS Department of Transportation. In addition, the Seneca Nation of Indians, the Transportation Council of the Buffalo-Niagara Partnership, and the Empire State Development Corporation serve formally as Regional Strategic Stakeholders.

The GBNRTC is focused on establishing a comprehensive, coordinated, and continuing transportation planning process for the Erie and Niagara Counties’ metropolitan area. The metropolitan planning process allows for the allocation of millions of dollars in federal funding annually to improve transportation of all modes of travel. This includes public transit, walking, bicycling, as well as the automobile in the two-county region.

Buffalo Niagara Medical Campus (BNMC)

<http://www.bnmc.org>

The Buffalo Niagara Medical Campus (BNMC) is a consortium of the region's primary health care, life sciences research, and medical education institutions, all co-located on 120-acres in downtown Buffalo, New York. In 2001, the BNMC developed a unique partnership in which the University at Buffalo, Roswell Park Cancer Institute, Olmsted Center for the Visually Impaired, Kaleida Health, Hauptman-Woodward Medical Research Institute, Buffalo Medical Group Foundation and Buffalo Hearing & Speech Center began working in collaboration with the surrounding neighborhoods and local government to cultivate a world-class medical campus in downtown Buffalo through development of a Master Plan & Implementation Strategy to provide a framework for future growth at the medical campus.

BNMC Activities

- Coordinates activities related to the planning, development, and enhancement of the 120-acre site
- Facilitates collaboration among member institutions, as well as the community at large
- Addresses issues of common concern to member institutions and neighbors
- Creates a distinct environment that provides opportunities for active living

BNMC Mission

To promote a knowledge-based transformation of Western New York through the biomedical research, education, clinical practice, and entrepreneurship of its member institutions.

BNMC Vision

To be a magnet of opportunities – attracting and retaining the best and the brightest.

BNMC History

For decades, the region's major clinical care, research-related, and medical education institutions have co-existed within blocks of each other in downtown Buffalo. While they have collaborated with regard to patient care and scientific research for years, there had been little coordinated planning for the development of our shared property.

2001 marked a new beginning when these major clinical care, research and educational institutions, in partnership with the City of Buffalo, the County of Erie, and the historic Fruit Belt and Allentown neighborhoods, formed the BNMC to create a master plan for the development of the growing medical community.

Since its inception, the BNMC has become a hub of public and private investment and has emerged as the address for the region's life sciences initiatives.

The Buffalo & Erie County Workforce Investment Board (WIB)/Workforce Development Consortium (WDC)

<http://www.becwib.org>

<http://www.bdcinc.org>

The WIB oversees federal Workforce Investment Act (WIA) funding in Erie County. In this role the WIB is responsible for coordinating workforce investment activities with economic development strategies and developing employer linkages. WIA funding can be used to provide employers with assistance for on-the-job training and/or customized training:

The WDC was established by the City of Buffalo and County of Erie to be a One-Stop Operator on their behalf.

Primarily, the WDC administers Federal and State Workforce Investment Act funds, youth funds, Welfare-to-Work Grant funds and such other funds as approved by the Workforce Investment Board of Buffalo and Erie County. It may also administer other government or private grant funds for employment and training program purposes.

Erie Canal Harbor Development Corporation (ECHDC)

www.eriecanalharbor.com

Erie Canal Harbor Development Corporation (ECHDC) was established in 2005 as a subsidiary of Empire State Development. ECHDC's mission is to "revitalize Buffalo's inner and outer harbor areas and restore economic growth to Western New York, based on the region's legacy of pride, urban significance and natural beauty".

Since its foundation in 2005, ECHDC has taken an aggressive approach to waterfront redevelopment, resulting in significant progress over a very short amount of time. The Corporation recently completed work on the \$53 million Erie Canal Harbor Redevelopment Project, which revitalized 12.5 acres of idle waterfront space into a contemporary downtown tourist destination.

ECHDC has been instrumental in advancing the overall "Canal Side" project, which focuses on developing 23 acres of Buffalo's inner harbor lands for public, commercial, residential and other mixed-uses. This redevelopment effort includes several substantial construction projects, including reclamation, asbestos remediation and demolition of the Buffalo Memorial Auditorium ("Aud"), as well as reclamation, asbestos remediation and refurbishment of the General Donovan State Office Building, which are both situated on the proposed "Canal Side" site.

Recent ECHDC activity regarding Buffalo's outer harbor has mainly focused on securing several of the area's largest land parcels, in order to transform these lots into park space, and also prepare them for eventual redevelopment.

ECHDC is also in negotiations with NYPA and the Niagara Frontier Transportation Authority over the acquisition and transfer of an additional 125+ acres of outer harbor lands and is focused on reestablishing access between the inner and outer harbor areas. As a result, the Corporation is helping spearhead the Buffalo Harbor Bridge Study, which seeks to determine possible locations and structure options for a rapid access vehicle and pedestrian connector between the inner and outer harbor. This study is being funded through a partnership between the Federal Highway Administration (FHWA), New York State Department of Transportation (NYSDOT) and Empire State Development (ESD).

In 2007, with the help of the Governor's office and many other key elected officials, ECHDC struck a historic agreement with the New York Power Authority under the Niagara Power Project Re-Licensing process. This agreement provides a steady stream of funds to the Corporation, at the tune of \$3.5 million per year, for the next 50 years.

APPENDICES

**APPENDIX A
EMPLOYMENT BY SECTOR
2000 - 2007**

NAICS Industry = All Area = Erie County	Industry Title	2000		2005		2006		2007		% Change in Employment 2000 - 2007
		Average Employment	Average Wages	Average Employment	Average Wages	Average Employment	Average Wages	Average Employment	Average Wages	
	Total, All Industries	459,828	\$31,489	452,307	\$35,514	451,642	\$37,274	456,478	\$37,274	-0.73%
	Total, All Private	386,578	\$30,436	377,590	\$34,278	378,134	\$35,955	379,505	\$35,955	-1.83%
	Total, All Government	73,250	\$37,049	\$74,717	\$41,762	73,508	\$44,056	76,973	\$44,056	5.08%
	Health Care and Social Assistance	56,348	\$27,076	\$57,848	\$31,192	57,492	\$33,090	57,559	\$33,090	2.15%
	Retail Trade	54,170	\$17,694	\$52,191	\$20,420	51,531	\$21,081	50,731	\$21,081	-8.35%
	Manufacturing	64,613	\$45,680	51,873	\$51,461	50,874	\$53,714	49,968	\$53,714	-22.67%
	Accommodation and Food Services	33,657	\$10,995	\$34,371	\$12,197	34,727	\$13,061	36,062	\$13,061	7.15%
	Food Services and Drinking Places	30,209	\$10,240	\$31,471	\$11,841	31,711	\$12,705	33,033	\$12,705	9.35%
	Administrative and Waste Services	27,312	\$21,021	\$28,146	\$25,592	28,791	\$25,750	28,183	\$25,750	3.19%
	Finance and Insurance	21,655	\$43,600	\$25,629	\$50,798	26,315	\$53,506	24,879	\$53,506	14.89%
	Professional and Technical Services	21,728	\$40,522	\$21,420	\$44,852	22,081	\$46,462	23,566	\$46,462	8.46%
	Professional and Technical Services	21,728	\$40,522	\$21,420	\$44,852	22,081	\$46,462	23,566	\$46,462	8.46%
	Ambulatory Health Care Services	19,155	\$33,224	\$20,128	\$41,114	20,380	\$42,044	20,829	\$42,044	\$0
	Wholesale Trade	20,930	\$38,692	\$20,360	\$45,976	20,155	\$47,899	20,487	\$47,899	-2.12%
	Construction	17,057	\$36,498	16,067	\$41,676	16,256	\$43,996	16,695	\$43,996	-2.12%
	Other Services	16,948	\$19,029	\$15,843	\$20,572	15,609	\$21,617	16,005	\$21,617	-5.56%
	Nursing and Residential Care Facilities	12,158	\$19,335	\$14,853	\$22,776	14,680	\$24,197	14,646	\$24,197	20.46%
	Transportation and Warehousing	13,783	\$31,804	\$11,547	\$35,897	11,798	\$37,443	12,871	\$37,443	-6.62%
	Hospitals	15,113	\$32,437	\$13,667	\$33,119	13,368	\$37,882	12,869	\$37,882	-14.85%
	Credit Intermediation & Related Activity	11,649	\$41,268	\$12,682	\$50,333	12,907	\$53,480	11,789	\$53,480	1.20%
	Insurance Carriers & Related Activities	8,249	\$40,333	\$11,368	\$48,230	11,667	\$49,377	11,293	\$49,377	36.90%
	Educational Services	8,753	\$21,022	\$10,925	\$24,556	10,805	\$25,981	11,041	\$25,981	26.14%
	Social Assistance	9,922	\$16,527	\$9,200	\$20,207	9,065	\$20,290	9,215	\$20,290	-7.13%
	Management of Companies and Enterprises Information	5,983	\$58,189	\$7,707	\$58,109	8,308	\$60,055	8,848	\$60,055	50.40%
	Fabricated Metal Product Manufacturing	8,745	\$37,850	\$8,539	\$43,882	8,182	\$47,643	7,688	\$47,643	-12.08%
	Real Estate and Rental and Leasing	7,920	\$43,113	6,123	\$50,390	6,238	\$51,310	6,210	\$51,310	-18.50%
	Arts, Entertainment, and Recreation	5,996	\$25,499	\$6,376	\$31,315	6,412	\$31,753	6,062	\$31,753	1.10%
	Food Manufacturing	5,374	\$37,214	\$5,547	\$38,174	5,406	\$46,745	5,785	\$46,745	7.65%
	Food Manufacturing	6,707	\$37,536	5,909	\$46,293	5,600	\$48,057	5,333	\$48,057	-20.49%
	Transportation Equipment Manufacturing	9,378	\$73,571	6,314	\$72,156	5,544	\$86,010	4,870	\$86,010	-48.06%

Machinery Manufacturing	5,573	\$43,027	4,262	\$50,730	4,551	\$52,559	4,752	-14.73%
Plastics & Rubber Products Manufacturing	5,051	\$41,829	4,432	\$49,943	4,358	\$50,832	4,496	-10.99%
Chemical Manufacturing	4,146	\$51,248	3,797	\$61,989	3,874	\$62,873	3,622	-12.64%
Miscellaneous Manufacturing	4,585	\$38,351	3,167	\$44,486	3,246	\$43,944	3,275	-28.57%
Computer and Electronic Product Mfg	3,469	\$41,439	3,264	\$50,391	3,208	\$51,749	3,154	-9.06%
Accommodation	3,448	\$17,610	\$2,901	\$16,056	3,017	\$16,804	3,029	-12.15%
Printing and Related Supporting Activities	3,343	\$35,657	3,187	\$38,738	2,914	\$37,675	2,711	-18.91%
Primary Metal Manufacturing	2,123	\$54,689	2,036	\$60,386	2,083	\$60,790	2,051	-3.39%
Electrical Equipment and Appliances	2,894	\$44,182	2,058	\$62,356	1,919	\$71,893	2,003	-30.79%
Nonmetallic Mineral Product Mfg	1,898	\$34,431	1,559	\$42,690	1,371	\$45,523	1,789	-5.78%
Financial Investment & Related Activity	1,324	\$90,002	\$1,399	\$75,272	1,585	\$85,300	1,651	24.70%
Paper Manufacturing	1,733	\$38,281	1,831	\$37,583	1,573	\$39,886	1,565	-9.69%
Utilities	2,210	\$57,629	1,710	66,373	1,579	\$71,094	1,400	-36.65%
Wood Product Manufacturing	1,217	\$26,034	1,036	\$33,568	1,231	\$32,099	1,152	-5.34%
Apparel Manufacturing	1,923	\$29,033	1,298	\$33,649	1,294	\$30,369	1,009	-47.53%
Warehousing and Storage	1,646	\$32,315	\$846	\$34,350	867	\$36,998	894	-45.69%
Furniture and Related Product Mfg	829	\$30,363	533	\$38,044	523	\$39,813	553	-33.29%
Unclassified	225	\$15,165	\$658	\$21,739	806	\$20,741	525	133.33%
Beverage & Tobacco Product Manufacturing	396	\$35,032	399	\$42,540	459	\$39,411	505	27.53%
Petroleum & Coal Products Manufacturing	1,112	\$51,658	362	\$50,879	362	\$50,456	343	-68.15%
Textile Product Mills	288	\$28,276	276	\$30,393	283	\$30,577	324	12.50%
Mining	238	\$43,197	199	\$60,553	212	\$65,835	234	-1.69%
Textile Mills	243	\$38,763	189	\$39,838	208	\$42,117	216	-11.11%
Funds, Trusts and Other Financial Vehicles	86	\$21,220	\$150	\$32,677	145	\$37,667	137	
Leather and Allied Product Manufacturing								

Data Source: Quarterly Census of Employment and Wages, developed through a cooperative program between the State of New York and the U. S. Bureau of Labor Statistics.

**APPENDIX B
EMPLOYMENT BY SECTOR
2000 - 2007**

NAICS Industry = All Area =Erie County	2000			2005			2006			2007	
	Average Employment	Average Wages	Average Employment	Average Wages	Average Employment	Average Wages	Average Employment	Average Wages	Average Employment	Average Employment	% Change in Employment 2000 - 2007
Utilities	2,210	\$57,629	1,710	\$6,373	1,579	\$71,084	1,400	\$71,084	1,400	-36.65%	
Mining	238	\$43,197	199	\$60,553	212	\$65,835	234	\$65,835	234	-1.66%	
Management of Companies and Enterprises	5,883	\$59,189	\$7,707	\$58,109	8,308	\$60,055	8,848	\$60,055	8,848	50.40%	
Manufacturing	64,613	\$45,680	51,873	\$51,461	50,874	\$53,714	49,868	\$53,714	49,868	-22.67%	
Finance and Insurance	21,655	\$43,600	\$25,629	\$50,798	26,315	\$53,506	24,879	\$53,506	24,879	14.88%	
Wholesale Trade	20,930	\$38,692	\$20,360	\$45,976	20,155	\$47,899	20,487	\$47,899	20,487	-2.12%	
Information	8,745	\$37,850	\$8,539	\$43,882	8,182	\$47,643	7,688	\$47,643	7,688	-12.09%	
Arts, Entertainment, and Recreation	5,374	\$37,214	\$5,547	\$38,174	5,406	\$46,745	5,785	\$46,745	5,785	7.65%	
Professional and Technical Services	21,728	\$40,522	\$21,420	\$44,852	22,081	\$46,462	23,566	\$46,462	23,566	8.46%	
Total, All Government	73,250	\$37,049	\$74,717	\$41,762	73,508	\$44,056	76,973	\$44,056	76,973	5.08%	
Construction	17,057	\$36,498	16,067	\$41,676	16,256	\$43,996	16,695	\$43,996	16,695	-2.12%	
Transportation and Warehousing	13,783	\$31,804	\$11,547	\$35,897	11,798	\$37,443	12,871	\$37,443	12,871	-6.62%	
Health Care and Social Assistance	56,348	\$27,076	\$57,848	\$31,192	57,492	\$33,090	57,559	\$33,090	57,559	2.15%	
Real Estate and Rental and Leasing	5,986	\$25,499	\$6,376	\$31,315	6,412	\$31,753	6,082	\$31,753	6,082	1.10%	
Educational Services	8,753	\$21,022	\$10,925	\$24,556	10,805	\$25,981	11,041	\$25,981	11,041	26.14%	
Other Services	16,848	\$19,029	\$15,643	\$20,572	15,609	\$21,617	16,005	\$21,617	16,005	-5.56%	
Agriculture, Forestry, Fishing & Hunting	955	\$17,670	836	\$20,644	793	\$21,538	916	\$21,538	916	-4.08%	
Retail Trade	54,170	\$17,684	\$52,191	\$20,420	51,531	\$21,061	50,731	\$21,061	50,731	-6.35%	
Unclassified	225	\$15,165	\$658	\$21,739	806	\$20,741	525	\$20,741	525	133.33%	
Accommodation and Food Services	33,657	\$10,995	\$34,371	\$12,197	34,727	\$13,061	36,062	\$13,061	36,062	7.15%	

Data Source: Quarterly Census of Employment and Wages, developed through a cooperative program between the State of New York and the U. S. Bureau of Labor Statistics.

Appendix C

Nonfarm Employment by Industry (NAICS) New York State and Metropolitan Areas Data Source: Current Employment Statistics Survey

Data for Buffalo-Niagara Falls, NY Metropolitan Statistical Area

(Data are *not* seasonally adjusted. Data are preliminary and subject to revision.)

Data in Thousands.

Industry	August 2009	July 2009	August 2008	Net Change Over the Month	Percent Change Over the Month	Net Change Over the Year	Percent Change Over the Year
Total Nonfarm	539.2	538.2	553.0	1.0	0.2%	-13.8	-2.5%
Total Private	449.3	447.2	461.7	2.1	0.5%	-12.4	-2.7%
Goods Producing	74.9	74.3	82.3	0.6	0.8%	-7.4	-9.0%
Natural Resources, Mining and Construction	21.5	21.0	23.9	0.5	2.4%	-2.4	-10.0%
Manufacturing	53.4	53.3	58.4	0.1	0.2%	-5.0	-8.6%
Durable Goods	31.7	31.6	35.6	0.1	0.3%	-3.9	-11.0%
Non-Durable Goods	21.7	21.7	22.8	0.0	0.0%	-1.1	-4.8%
Service-Providing	464.3	463.9	470.7	0.4	0.1%	-6.4	-1.4%
Private Service-Providing	374.4	372.9	379.4	1.5	0.4%	-5.0	-1.3%
Trade, Transportation, and Utilities	98.5	99.0	102.9	-0.5	-0.5%	-4.4	-4.3%
Wholesale Trade	22.2	22.5	23.4	-0.3	-1.3%	-1.2	-5.1%
Retail Trade	59.1	59.1	62.1	0.0	0.0%	-3.0	-4.8%
Transportation, Warehousing, and Utilities	17.2	17.4	17.4	-0.2	-1.1%	-0.2	-1.1%
Information	8.1	8.2	8.5	-0.1	-1.2%	-0.4	-4.7%

Appendix C

Financial Activities	32.8	32.8	33.2	0.0	0.0%	-0.4	-1.2%
Finance and Insurance	26.1	26.1	26.4	0.0	0.0%	-0.3	-1.1%
Professional and Business Services	72.8	71.6	73.8	1.2	1.7%	-1.0	-1.4%
Professional, Scientific, and Technical Services	28.6	27.8	27.5	0.8	2.9%	1.1	4.0%
Management of Companies and Enterprises	9.8	9.9	10.1	-0.1	-1.0%	-0.3	-3.0%
Admin. & Supp. and Waste Manage. & Remed. Servs.	34.4	33.9	36.2	0.5	1.5%	-1.8	-5.0%
Educational and Health Services	86.0	84.6	84.2	1.4	1.7%	1.8	2.1%
Health Care and Social Assistance	70.5	70.6	71.0	-0.1	-0.1%	-0.5	-0.7%
Hospitals	16.2	16.3	16.5	-0.1	-0.6%	-0.3	-1.8%
Leisure and Hospitality	52.3	52.7	52.7	-0.4	-0.8%	-0.4	-0.8%
Accommodation and Food Services	44.0	44.3	44.6	-0.3	-0.7%	-0.6	-1.3%
Food Services and Drinking Places	39.1	39.7	39.9	-0.6	-1.5%	-0.8	-2.0%
Other Services	23.9	24.0	24.1	-0.1	-0.4%	-0.2	-0.8%
Government	89.9	91.0	91.3	-1.1	-1.2%	-1.4	-1.5%
Federal Government	10.0	10.2	10.1	-0.2	-2.0%	-0.1	-1.0%
State Government	20.3	20.7	21.2	-0.4	-1.9%	-0.9	-4.2%
Local Government	59.6	60.1	60.0	-0.5	-0.8%	-0.4	-0.7%
Local Government Education	27.9	28.0	28.1	-0.1	-0.4%	-0.2	-0.7%
Local Government Hospitals	2.7	2.6	2.5	0.1	3.8%	0.2	8.0%

For more information concerning Current Employment by Industry, see Technical Notes. For additional information on the various sources of employment data, see comparing sources of employment data.

For additional information, contact your local labor market analyst.

Appendix C

Nonfarm Employment by Industry (NAICS) Buffalo-Niagara Falls, NY Metropolitan Statistical Area April 2010¹

Current Employment by Industry

Data For Buffalo-Niagara Falls, NY Metropolitan Statistical Area

(Data are *not* seasonally adjusted. Data are preliminary and subject to revision.)

[Excel Format](#)
[CSV Format](#)

Data in Thousands.

Industry	APR 2010	MAR 2010	APR 2009	Net Month	Percent Month	Net Year	Percent Year
Total Nonfarm	534.7	529.3	535.9	5.4	1.0%	-1.2	-0.2%
Total Private	438.1	432.6	439.2	5.5	1.3%	-1.1	-0.3%
Goods Producing	85.5	84.1	89.6	1.4	2.2%	-4.1	-5.9%
Natural Resources, Mining and Construction	18.3	17.0	18.3	1.3	7.6%	0.0	0.0%
Manufacturing	47.2	47.1	51.3	0.1	0.2%	-4.1	-8.0%
Durable Goods	27.7	27.6	30.5	0.1	0.4%	-2.6	-9.2%
Non-Durable Goods	19.5	19.5	20.8	0.0	0.0%	-1.3	-6.3%
Service-Providing	489.2	465.2	466.3	4.0	0.9%	2.9	0.6%
Private Service-Providing	372.8	368.5	369.6	4.1	1.1%	3.0	0.8%
Trade, Transportation, and Utilities	97.1	96.5	96.3	0.6	0.6%	0.8	0.8%
Wholesale Trade	20.6	20.5	21.7	0.1	0.5%	-1.1	-5.1%
Retail Trade	61.1	60.7	58.4	0.4	0.7%	2.7	4.6%
Transportation, Warehousing, and Utilities	15.4	15.3	16.2	0.1	0.7%	-0.6	-4.9%
Information	7.9	8.0	8.3	-0.1	-1.3%	-0.4	-4.8%
Financial Activities	31.1	31.0	31.5	0.1	0.3%	-0.4	-1.3%
Finance and Insurance	24.4	24.5	25.1	-0.1	-0.4%	-0.7	-2.6%
Professional and Business Services	72.0	70.2	70.2	1.8	2.6%	1.8	2.6%
Professional, Scientific, and Technical Services	27.7	27.4	27.8	0.3	1.1%	0.1	0.4%
Management of Companies and Enterprises	11.8	11.7	11.3	0.1	0.9%	0.5	4.4%
Admin. and Supp. and Waste Manage. & Remed. Serve.	32.5	31.1	31.3	1.4	4.5%	1.2	3.8%
Education and Health Services	90.4	90.8	90.0	-0.4	-0.4%	0.4	0.4%
Health Care and Social Assistance	73.2	73.0	72.3	0.2	0.3%	0.9	1.2%
Hospitals	16.4	16.4	16.4	0.0	0.0%	0.0	0.0%
Leisure and Hospitality	49.4	47.5	49.1	1.9	4.0%	0.3	0.6%
Accommodation and Food Services	42.5	41.8	42.7	0.9	2.2%	-0.2	-0.5%
Food Services and Drinking Places	40.1	38.9	39.1	1.2	3.1%	1.0	2.6%
Other Services	24.7	24.5	24.2	0.2	0.8%	0.5	2.1%
Government	96.6	96.7	96.7	-0.1	-0.1%	-0.1	-0.1%
Federal Government	10.3	10.0	10.5	0.3	3.0%	-0.2	-1.9%
State Government	22.7	22.8	22.8	-0.1	-0.4%	-0.1	-0.4%
Local Government	63.6	63.9	63.4	-0.3	-0.5%	0.2	0.3%
Local Government Education	36.4	36.5	35.8	-0.1	-0.3%	0.6	1.7%
Local Government Hospitals	2.4	2.4	2.5	0.0	0.0%	-0.1	-4.0%

APPENDIX D

Brookings Institution — Metro Monitor

MetroMonitor: Buffalo, NY

Tracking Economic Recovery in
the Buffalo-Niagara Falls, NY Metropolitan Area
Second Quarter, 2009

This profile tracks recent economic performance in the Buffalo metropolitan area compared to America's 100 largest metro areas and the nation through the second quarter of 2009. For an analysis of economic conditions in all 100 metro areas, please see "MetroMonitor: Tracking Economic Recession and Recovery in America's 100 Largest Metropolitan Areas." This and other metropolitan profiles are accessible via interactive maps at www.brookings.edu/metromonitor.

	Buffalo	Rank*	100-metro average	U.S. average
Employment				
Change in employment from peak (2008Q3)	-2.8 %	31	-3.8 %	-4.1 %
One-quarter change in employment	0.0 %	4	-1.1 %	-1.2 %
Unemployment				
Unemployment rate	8.9 %	44	9.7 %	9.7 %
One-year percentage point change in unemployment rate	3.3 points	39	4.0 points	4.0 points
Gross metropolitan product (GMP)				
Change in GMP from peak (2007Q3)	-4.1 %	48	-3.7 %	-2.8 %
One-quarter change in GMP	-0.5 %	71	-0.3 %	-0.2 %
Housing prices				
One-year change in housing prices	3.7 %	4	-4.4 %	-1.7 %
Real estate owned properties (REOs)				
REOs per 1,000 mortgageable properties	0.95	4	4.20	3.34
One-quarter change in REOs per 1,000 mortgageable properties	0.07	30	0.33	0.28

*For all indicators, a rank of 1 signifies the strongest-performing metro while a rank of 100 signifies the weakest-performing metro.

Appendix E
Wage Comparisons for Occupational Groups
Buffalo-Niagara MSA as Compared with Cleveland, Philadelphia and Boston

All Occupations

Area Name	2006 Average (Mean) Wages ¹	
	Hourly	Annual
Buffalo-Niagara Falls, NY	\$17.98	\$37,400
Cleveland-Elyria-Mentor, OH	\$19.06	\$39,640
Philadelphia, PA	\$20.68	\$43,010
Boston-Quincy-Cambridge, MA	\$25.05	\$52,100

Computer and Mathematical Occupations

Area Name	2006 Average (Mean) Wages ¹	
	Hourly	Annual
Buffalo-Niagara Falls, NY	\$26.94	\$56,030
Cleveland-Elyria-Mentor, OH	\$30.64	\$63,730
Philadelphia, PA	\$33.27	\$69,190
Boston-Quincy-Cambridge, MA	\$38.54	\$80,170

Production Occupations

Area Name	2006 Average (Mean) Wages ¹	
	Hourly	Annual
Buffalo-Niagara Falls, NY	\$16.36	\$34,020
Cleveland-Elyria-Mentor, OH	\$16.04	\$33,370
Philadelphia, PA	\$16.39	\$34,090
Boston-Quincy-Cambridge, MA	\$16.87	\$35,090

Business and Financial Operations Occupations

Area Name	2006 Average (Mean) Wages ¹	
	Hourly	Annual
Buffalo-Niagara Falls, NY	\$25.97	\$54,020
Cleveland-Elyria-Mentor, OH	\$26.96	\$56,070
Philadelphia, PA	\$30.58	\$63,610
Boston-Quincy-Cambridge, MA	\$34.73	\$72,230

Healthcare Practitioners and Technical Occupations

Area Name	2006 Average (Mean) Wages ¹	
	Hourly	Annual
Buffalo-Niagara Falls, NY	\$27.28	\$56,730
Cleveland-Elyria-Mentor, OH	\$29.13	\$60,590
Philadelphia, PA	\$31.02	\$64,530
Boston-Quincy-Cambridge, MA	\$34.54	\$71,850

Management Occupations		
Area Name	2006 Average (Mean) Wages ¹	
	Hourly	Annual
Buffalo-Niagara Falls, NY	\$43.42	\$90,300
Cleveland-Elyria-Mentor, OH	\$46.48	\$96,670
Philadelphia, PA	\$47.19	\$98,150
Boston-Quincy-Cambridge, MA	\$53.50	\$111,280

Office and Administrative Support Occupations		
Area Name	2006 Average (Mean) Wages ¹	
	Hourly	Annual
Buffalo-Niagara Falls, NY	\$14.21	\$29,560
Cleveland-Elyria-Mentor, OH	\$14.60	\$30,360
Philadelphia, PA	\$15.40	\$32,030
Boston-Quincy-Cambridge, MA	\$17.74	\$36,910

Source: U.S. Bureau of Labor Statistics and NYS Department of Labor

APPENDIX F

Shovel Ready Sites and Sites being Prepared for Commercial and Industrial Development

Erie and Niagara Counties

Sites Available for Industrial and Commercial Investment, 2008

<i>Site Location/Name</i>	<i>Locality</i>	<i>Available Acres</i>
College Park	Amherst	25
Crosspoint Business Park	Amherst	100
Buffalo Niagara Medical Campus	Buffalo	10
Central Park Plaza	Buffalo	10
Northland Commerce Center	Buffalo	10
Steel Fields Industrial Site	Buffalo	90
Buffalo Lakeside Commerce Park	Buffalo	20
Airborne Business Park	Cheektowaga	60
Commerce Green Industrial Park	East Aurora	20
Eden Industrial Park	Eden	5
Ravenwood Park North	Hamburg	20
Albright Court/Amadori Site	Lackawanna	24
Transit Road at Exit 49	Lancaster	70
WNY Commerce Center	Lancaster	117
Adelphia Vacant Land	Lewiston	35
Pletcher Road Site	Lewiston	23
6784 South Transit Road	Lockport	50
Oakhurst Street	Lockport	26
Town of Lockport Industrial Park	Lockport	104
Whiting Industrial Park	Newslead	20
3401 Military Road	Niagara	26
47th Street	Niagara Falls	74
Highland/Hyde Park Business Park	Niagara Falls	17
Johnson Property	Niagara Falls	36
Robin Steel	North Tonawanda	24
OP Commerce Center	Orchard Park	40
Quaker Centre	Orchard Park	30
Campbell Blvd at Pendleton Center	Pendleton	13
Lewiston Porter Industrial Park	Porter	42
Colvin Woods Business Park	Tonawanda	15
River Road - Isle View	Tonawanda	100
Lancaster Village Industrial Park	Village of Lancaster	10
North America Center	West Seneca	220
Forest City Property - Commercial	Wheatfield	155
Forest City Property - Industrial	Wheatfield	210
Summit Business Park	Wheatfield	187
Vantage International Pointe	Wheatfield	75
Woodlands East	Wheatfield	120
	<i>Total Region</i>	2,233

Source: Framework for Regional Growth, Final Report, October 2006, Chapter 2

**Appendix G
Office and Industrial Space Inventory
September 2009
Erie County**

CITY	OFFICE SPACE			INDUSTRIAL SPACE			TOTAL SPACE
	Total	Available		Total	Available		
'BUFFALO	19,656,611	3,801,912	19.3%	42,348,424	8,527,768	20.1%	95,034,258
'AMHERST	12,410,930	2,004,401	16.11%	3,102,240	198,479	6.4%	29,843,050
'CHEEKTOWAGA	4,243,944	1,138,030	26.8%	11,568,637	2,193,584	18.9*	26,125,487
'CLARENCE	1,051,180	232,415	22.1%	1,077,326	160,064	14.8%	6,810,233
IDEPEW	988,640	162,079	16.3%	3,429,040	356,971	10.4*	5,298,621
'GRAND ISLAND	514,633	47,824	9.2%	1,362,424	81,490	5.9*	2,615,870
'HAMBURG	894,178	233,786	26.1*	5,264,029	484,324	9.2*	10,699,186
'KENMORE	477,852	122,054	25.5%	829,412	166,537	20.0*	2,750,410
1LACKAWANNA	416,871	104,035	24.9%	1,452,024	381,453	26.2*	2,556,089
'LANCASTER	1,186,306	273,069	23.0*	4,812,970	237,151	4.9*	8,546,554
'ORCHARD PARK	1,370,914	259,833	18.9%	2,388,635	113,148	4.7%	5,861,778
'TONAWANDA	2,357,127	366,750	15.5*	13,478,050	1,204,759	8.9%	20,866,673
'WEST SENECA	1,318,767	265,378	20.1%	3,046,754	627,318	20.5*	7,540,378
'OTHER ERIE COUNTY	1,279,917	192,032	15.0%	6,653,900	1,417,265	21.3*	11,265,545
TOTAL	48,167,870	9,203,598	19.1*	100,813,865	16,150,311	16.0%	235,814,132

Source: J.R. Militello Realty, Inc. — September 2009

Appendix H

Work Plan Overview

Queen city Hub: Regional Action Plan for Downtown

Excerpts from the Work Plan Overview
of the
Queen City Hub: Regional Action Plan for Downtown

Four Activities

A major focus of the vision is to create a Downtown where people live, work and play. Towards that end, the work tasks in activity areas relate directly to:

Living Downtown

Living Downtown: building diverse and mixed-use neighborhoods Downtown that interconnect strategic investment areas and the inner ring of neighborhoods. An important part of living Downtown is the ability to shop Downtown, meeting retail demand for new residential populations as well as the Downtown worker population.

Working Downtown

Working Downtown: retaining existing jobs and adding new jobs in all five strategic investment areas by stressing our regional role as the upstate center for government, finance, insurance, real estate, law and life sciences. To this we add the development of a Downtown education campus building on the strength of the Erie Community College and library and a new public safety campus.

Visiting Downtown

Visiting Downtown: supporting diverse venues for the broad cross section of visitors to Downtown with further investments in venues like hotel and conference accommodations. Visiting Downtown requires improved signage, “wayfinding” and interpretation of significant attractions Downtown, making them visitor friendly with a full complement of amenities. It also requires both better marketing and coordination of “visitor ready” attractions as well as better product development for those visitor attractions that are not yet available.

Shopping Downtown

Shopping Downtown: creating an environment that invites small businesses to fill vacant or underutilized ground floor space. Shopping Downtown needs a competitive mix of goods that cater to Downtown workers, visitors, new Downtown residents, and residents of the inner ring of neighborhoods.

Five Principles

Each of the four activity programs should be implemented in accordance with five key principles for Downtown: access, urban design and management, preservation, energy and green design, and image.

Accessing Downtown

Accessing Downtown: making the Downtown Hub easy to understand and user friendly with fully integrated pedestrian, bike, car, bus and rail services. It must be an access system that is well connected to the neighborhoods and the waterfront while it supports all the activities Downtown.

Urban Design and Management

Urban Design and Management Downtown: creating a quality pedestrian environment; one that is both beautiful and urban.

Preservation

Preservation Downtown: assuring the preservation of historically significant buildings and related urban fabric and districts. A preservation approach designed to use history as a significant economic development tool, balancing a reasonable demolition policy with building re-use and restoration.

Energy and Green Design

Energy and Green Design Downtown: achieving energy efficiencies and related cost savings, improving our ecology with sustainable design, and adding to the quality of life in Downtown.

Image

Image Downtown: representing an accurate picture of Downtown, its current life and future potential.

Appendix I

Residential Data – Downtown Buffalo

Downtown Buffalo Apartment and Condominium Data

Status	Name of Building	Address	Built	Units	Condo Sale/ Rental Range	CBD?
Existing - Pre 2000	267 Franklin	267 Franklin Street	1883	14	\$400-\$475	yes
	329 Franklin	329 Franklin Street	1920	12	\$495-\$650	yes
	401 Delaware	399 Delaware	1900	29		yes
	Admirals Walk	Admirals Walk	1991	49		no
	Ansonia Center	716 Main Street	1980s	58	\$400-\$1100	yes
	Braco Buildings	352 Franklin Street	1900	35	\$389-\$607	yes
	Breakwaters	200-302 Lakefront Blvd	1985	48		no
	Burns Building	23 East Huron	1925	4	\$700-\$800	yes
	Caberet	484 Pearl Street	1900	12	\$240-\$320	yes
	City Centre	610 Main Street	1996	41	\$175,000-\$320,000	yes
	Ellicott Row House	435 Ellicott	1996	2	\$500.00	yes
	Gull Landing	Gull Landing Circle	1991	23		no
	Harbour Pointe	40 Harbour Pointe Comm	1981	30		no
	Henry Building	41 West Tupper Street	1900	8	\$400.00	yes
	Holly Farms	424 Pearl Street	1932	2	\$625.00	yes
	Lakefront Commons	Lakefront Blvd	1985	52		no
	Marina Park	Marina Park S	1985	22		no
	Marine Drive	Marine Drive	1950s	616	\$256-\$493	no
	Market Arcade	617 Main Street	1999	10	\$975-\$1275	yes
	Pine Harbor	10 7th Street	1980s	208		no
	Portside	100 Portside	1996	18		no
	Quality First Appliances	334 Oak Street	1999	2		yes
	Rivermist	172-280 Rivermist Dr	1988	56		no
	Rue Franklin	341 Franklin Street	1968	5	\$450.00	yes
	Shoreline Apartments	200 Niagara Street	1980s	142		no
	Spaulding Building	763 Main Street	1900	19	\$225-\$550	yes
	St. Mary's Square	125 Edward Street	1990s	35		no
	The Colonial	401 Delaware Avenue	1880s	28	\$495-\$695	yes
	The Netherlands	267 Franklin Street	1888	14	\$0.00	yes
	Touraine Apartments	262 Delaware Avenue	1920	104	\$800-\$1300*	yes
Sub Total Pre 2000				1698		CBD
Existing - New	Artspace Buffalo	1219 Main Street	2008	60		no
	Bellasara	540 Delaware Avenue	2008	14		no
	Buehl Block	36 Broadway	2006	5		yes
	Cobblestone Lofts	26 Mississippi	2009	5	around \$100 SF?	yes
	Elk Terminal	250 Perry Street	2002	70	\$900-1895	no
	Ellicott Commons	461-475 Ellicott	2007	30	\$1,050.00	yes
	Ellicott Lofts	489 Ellicott Street	2003	23	\$895-\$1250	yes
	Elsinghorst Building	136-140 Broadway	2007	3		yes
	Franklin-Tupper	331 Franklin Street		11		yes
	Granite Works	800 Main Street	2006	29		no
	Gull Landing Townhouses	Waterfront Circle	2002	5		no
	Historic Warehouse Lofts	210 Ellicott	2008	30	\$995-\$1650	yes
	Holling Place	501 Washington Street	2005	82	\$605-\$723	yes
	IS Lofts	362 Oak Street	2006	24	\$700.00	yes
	IT Lofts	461-475 Ellicott	2007	28	\$0.00	yes
	Oak School Lofts	266 Oak Street	2005	29	\$795-\$975	yes
	Pierce Building	653 Main Street	2007	4	\$2,500.00	yes
	Sidway Building	775 Main Street	2004	67	\$725-\$1900	yes
	The Belesario	500-518 Main Street	2004	30	\$1600-\$2495	yes
	The Pasquale	132 Lakefront Blvd	2009	49	\$499,000.00	no
The Whitney	65 Whitney Place	2009	6	Estimated \$100 SF	yes	
Webb Building	92 Pearl Street	2007	32	\$1050-\$1150	yes	
Subtotal Existing				1698	CBD Subtotal before 2000	309
Subtotal New				636	CBD Subtotal since 2000	409
Total Units				2334	CBD Subtotal	808
Increase since 2000				27.2%	Increase since 2000	50.6%
Condo Subtotal				434	2009 Q1 USPS Units Estimate CBD	578
Condominium %				18.6%	Real CBD minus USPS estimate	230
					CBD Population, 1.49 Avg. HH Size	1,620

399

Downtown Buffalo Apartment and Condominium Data

Status	Name of Building	Address	Built	Units	Condo Sale/ Rental Range	CBD?
Under Construction	501 Main	501 Main Street		2		yes
	504-506 Washington	504 Washington Street		6		yes
	Alling and Cory Warehouse	136 North Division Street		88		yes
	AM&As Warehouse	369 Washington Street		40		yes
	Avant	184 Delaware Avenue	2009	28		yes
	Packard Apartments	1325 Main Street	2009	40		no
Total				204		164

Proposed	Birzon Building	686 Main Street		10		yes
	Casa Luce	200 Lakefront Boulevard		26		no
	Courtyard Mall/Bakers	460 Main Street				yes
	Donovan State Office Building	125 Main Street				yes
	Grevers	537 Main Street		1		yes
	Hotel Huron and Lake Hotel	201 W Huron St		8		yes
	Schmidt Building Site	736 Main St		36		yes
	Second Waterfront Place Tower	Waterfront Place				no
	SPA Lofts	9 Genesee		2		yes
	Spaghetti Warehouse	Elm Street at Clinton		27		yes
	Statler Building	107 Delaware				yes
	Vermor/ Tech Building site			100		yes
Total				210		184

Appendix J

Master Plan
South Buffalo BOA



The feedback from our last open house was considered and incorporated into the Draft Master Plan for the BOA. This Draft Plan proposes a balanced mix of land uses for development, habitat restoration and recreation, balancing short term economic opportunities with the potential to achieve sustainable economic growth over the long term.

In order to allow for greater flexibility over time the land use specification has been simplified. Instead, emphasis will be placed on performance criteria to ensure that the overall place making objectives of the plan are met.

While significant land is reserved for a range of industrial uses, a large Business Park, several residential and live work opportunities and a series of high value nodes, including two Mixed Use Cores, a Signature Office cluster and an R&D campus broaden the land use mix.

Riverfront

- A modest Alternative Energy campus, large Bird Sanctuary and preservation and recreation initiatives on both sides of the River shift the focus of the River from industry to habitat restoration and recreation
- Environmental performance criteria enable potential port uses to integrate with the river environment
- Mixed Use Core and Research and Development campus capture value of this riverfront

Lakefront

- An active waterfront with employment, residential and recreational opportunities is fully integrated with a modest expansion of the Tift Nature Preserve
- Business uses diversify the employment base at Lakeside Commerce Park and create an enhanced setting for the canal

Rail Corridor

- Green industry and Warehouse and Distribution support the rail corridor

Hopkins Street Corridor

- Large Business Park and Business Services cluster allows for higher paying employment opportunities for existing neighborhoods

Infrastructure

- The construction of Fuhmann Boulevard allows for the long term reconfiguration of Route 5 into an at-grade boulevard allowing for improved physical connections and land use synergies between the lakefront and the BOA
- Potential density likely sufficient to support higher order transit connection to downtown from Riverbend

Open Space

- Significant investment in natural and recreational spaces including the greening of the riverfront, an expansion of Tift and an 1.8 hole golf course